



Soft Drinks in Georgia

December 2025

Table of Contents

Soft Drinks in Georgia

EXECUTIVE SUMMARY

Convenience, affordability, and health drive sales

KEY DATA FINDINGS

INDUSTRY PERFORMANCE

Continued growth for soft drinks

Gradual shift towards healthier choices

Consumers prioritise affordability amid mounting cost-of-living pressures

WHAT'S NEXT

Forecast steady growth despite price increases

Convenience will be key innovation driver

Further expansion of modern grocery retail will increase competitive pressures

COMPETITIVE LANDSCAPE

Coca-Cola strengthens leadership through marketing and chiller cabinet expansion

Caffeine-focused brands see strong performance

Growing presence of parallel imports

CHANNELS

Convenience stores remains leading distribution channel

E-commerce registers rapid growth

Retailers' optimisation strategies pose challenges for soft drinks players

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 Georgia](#)

KEY DATA FINDINGS

2025 DEVELOPMENTS

Convenience, innovation, and price dynamics shape bottled water

INDUSTRY PERFORMANCE

Modest growth amid price pressures

Still flavoured bottled water leads growth

WHAT'S NEXT?

Steady, yet modest growth expected, supported by rising on-the-go consumption and flavoured varieties

Innovations will drive expansion

Rising prices could lead to greater polarisation

COMPETITIVE LANDSCAPE

Borjomi maintains leadership

Coca-Cola's Mts brand leads growth

CHANNELS

Convenience stores continue to replace small local grocers

E-commerce fastest-growing channel

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

COUNTRY REPORTS DISCLAIMER

[Carbonates in Georgia](#)

KEY DATA FINDINGS

2025 DEVELOPMENTS

Carbonates remain highly popular with Georgian consumers

INDUSTRY PERFORMANCE

Continuation of positive growth trajectory

Reduced sugar lemonade/lime leads growth

WHAT'S NEXT?

International brands will drive continued growth

Local brands will turn to premiumisation amid fierce competition

Health and wellness trend will gain traction

COMPETITIVE LANDSCAPE

Coca-Cola holds leading position

Cola-Cola drives sales through marketing investment and chiller cabinet expansion

CHANNELS

Convenience stores remains primary channel

Convenience stores and e-commerce register rapid growth

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

COUNTRY REPORTS DISCLAIMER

[Juice in Georgia](#)

KEY DATA FINDINGS

2025 DEVELOPMENTS

Affordability is key for juice purchases

INDUSTRY PERFORMANCE

Price pressures push consumers towards more affordable choices

Cappy drives rapid expansion

WHAT'S NEXT?

Price dynamics will shape purchasing behaviour
Expanding variety of flavours and packaging formats
Retailers to increase private imports to boost margins

COMPETITIVE LANDSCAPE

Cola-Cola leads juice with Cappy
Cappy benefits from affordable positioning

CHANNELS

Convenience stores leads juice distribution
Nikora and Orinabiji drive growth of convenience stores

CATEGORY DATA

Table 65 - Off-trade Sales of Juice by Category: Volume 2020-2025
Table 66 - Off-trade Sales of Juice by Category: Value 2020-2025
Table 67 - Off-trade Sales of Juice by Category: % Volume Growth 2020-2025
Table 68 - Off-trade Sales of Juice by Category: % Value Growth 2020-2025
Table 69 - NBO Company Shares of Off-trade Juice: % Volume 2021-2025
Table 70 - LBN Brand Shares of Off-trade Juice: % Volume 2022-2025
Table 71 - NBO Company Shares of Off-trade Juice: % Value 2021-2025
Table 72 - LBN Brand Shares of Off-trade Juice: % Value 2022-2025
Table 73 - Forecast Off-trade Sales of Juice by Category: Volume 2025-2030
Table 74 - Forecast Off-trade Sales of Juice by Category: Value 2025-2030
Table 75 - Forecast Off-trade Sales of Juice by Category: % Volume Growth 2025-2030
Table 76 - Forecast Off-trade Sales of Juice by Category: % Value Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

RTD Coffee in Georgia

KEY DATA FINDINGS

2025 DEVELOPMENTS

RTD coffee gains traction amid convenience-driven demand

INDUSTRY PERFORMANCE

RTD coffee continues to grow from low base amid strong on-trade competition
Awareness and convenience drive growth but high prices limit reach

WHAT'S NEXT?

RTD coffee sales will be supported by convenience, but constrained by on-trade competition
Expanded assortment of products
Retail optimisation may limit growth

COMPETITIVE LANDSCAPE

Europroduct Ltd leads fragmented landscape
Odean Foods leads growth

CHANNELS

Convenience stores dominates RTD coffee distribution
E-commerce gains traction

CATEGORY DATA

- Table 77 - Off-trade Sales of RTD Coffee: Volume 2020-2025
- Table 78 - Off-trade Sales of RTD Coffee: Value 2020-2025
- Table 79 - Off-trade Sales of RTD Coffee: % Volume Growth 2020-2025
- Table 80 - Off-trade Sales of RTD Coffee: % Value Growth 2020-2025
- Table 81 - NBO Company Shares of Off-trade RTD Coffee: % Volume 2021-2025
- Table 82 - LBN Brand Shares of Off-trade RTD Coffee: % Volume 2022-2025
- Table 83 - NBO Company Shares of Off-trade RTD Coffee: % Value 2021-2025
- Table 84 - LBN Brand Shares of Off-trade RTD Coffee: % Value 2022-2025
- Table 85 - Forecast Off-trade Sales of RTD Coffee: Volume 2025-2030
- Table 86 - Forecast Off-trade Sales of RTD Coffee: Value 2025-2030
- Table 87 - Forecast Off-trade Sales of RTD Coffee: % Volume Growth 2025-2030
- Table 88 - Forecast Off-trade Sales of RTD Coffee: % Value Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

RTD Tea in Georgia

KEY DATA FINDINGS

2025 DEVELOPMENTS

RTD tea benefits from health trends and convenience-led consumption

INDUSTRY PERFORMANCE

Robust growth for RTD tea as consumers seek perceived healthier alternatives

Reduced sugar RTD tea remains undeveloped

WHAT'S NEXT?

Steady growth for RTD tea, supported by shift away from perceived high-sugar carbonates and expansion of modern retail

Growing presence of reduced sugar alternatives

Category will face increasing price pressure

COMPETITIVE LANDSCAPE

Coca-Cola leads with Fuse Tea

Unilever leads growth with Lipton Ice Tea

CHANNELS

Convenience stores lead sales

Retailers expand their networks

CATEGORY DATA

- Table 89 - Off-trade Sales of RTD Tea by Category: Volume 2020-2025
- Table 90 - Off-trade Sales of RTD Tea by Category: Value 2020-2025
- Table 91 - Off-trade Sales of RTD Tea by Category: % Volume Growth 2020-2025
- Table 92 - Off-trade Sales of RTD Tea by Category: % Value Growth 2020-2025
- Table 93 - NBO Company Shares of Off-trade RTD Tea: % Volume 2021-2025
- Table 94 - LBN Brand Shares of Off-trade RTD Tea: % Volume 2022-2025
- Table 95 - NBO Company Shares of Off-trade RTD Tea: % Value 2021-2025
- Table 96 - LBN Brand Shares of Off-trade RTD Tea: % Value 2022-2025
- Table 97 - Forecast Off-trade Sales of RTD Tea by Category: Volume 2025-2030
- Table 98 - Forecast Off-trade Sales of RTD Tea by Category: Value 2025-2030
- Table 99 - Forecast Off-trade Sales of RTD Tea by Category: % Volume Growth 2025-2030
- Table 100 - Forecast Off-trade Sales of RTD Tea by Category: % Value Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

[Energy Drinks in Georgia](#)

KEY DATA FINDINGS

2025 DEVELOPMENTS

Energy drinks gains traction amid health and convenience trends

INDUSTRY PERFORMANCE

Functional benefits and busy lifestyles drive demand

Rapid growth of reduced sugar options

WHAT'S NEXT?

Energy drinks poised for robust growth

Battle for shelf space amid intense competition

Price sensitivity will remain crucial factor

COMPETITIVE LANDSCAPE

Iberia Refreshments JSC leads energy drinks with Boom Fire

XL Energy is fastest-growing player

CHANNELS

Convenience stores meet on-the-go needs

E-commerce sees rapid expansion

CATEGORY DATA

Table 101 - Off-trade Sales of Energy Drinks: Volume 2020-2025

Table 102 - Off-trade Sales of Energy Drinks: Value 2020-2025

Table 103 - Off-trade Sales of Energy Drinks: % Volume Growth 2020-2025

Table 104 - Off-trade Sales of Energy Drinks: % Value Growth 2020-2025

Table 105 - NBO Company Shares of Off-trade Energy Drinks: % Volume 2021-2025

Table 106 - LBN Brand Shares of Off-trade Energy Drinks: % Volume 2022-2025

Table 107 - NBO Company Shares of Off-trade Energy Drinks: % Value 2021-2025

Table 108 - LBN Brand Shares of Off-trade Energy Drinks: % Value 2022-2025

Table 109 - Forecast Off-trade Sales of Energy Drinks: Volume 2025-2030

Table 110 - Forecast Off-trade Sales of Energy Drinks: Value 2025-2030

Table 111 - Forecast Off-trade Sales of Energy Drinks: % Volume Growth 2025-2030

Table 112 - Forecast Off-trade Sales of Energy Drinks: % Value Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

[Sports Drinks in Georgia](#)

KEY DATA FINDINGS

2025 DEVELOPMENTS

Sports drinks remains small, yet evolving category

INDUSTRY PERFORMANCE

Low consumer awareness and stiff competition hinder widespread adoption

Regular sports drinks dominate sales

WHAT'S NEXT?

Rising levels of health awareness to drive growth

Expected entry of new players
Price sensitivity could constrain growth

COMPETITIVE LANDSCAPE

Sports drinks remains relatively consolidated, with Oshee leading sales
Smaller players show most dynamic performance

CHANNELS

Supermarkets remains key channel for sports drinks
Convenience stores leads growth

CATEGORY DATA

Table 113 - Off-trade Sales of Sports Drinks: Volume 2020-2025
Table 114 - Off-trade Sales of Sports Drinks: Value 2020-2025
Table 115 - Off-trade Sales of Sports Drinks: % Volume Growth 2020-2025
Table 116 - Off-trade Sales of Sports Drinks: % Value Growth 2020-2025
Table 117 - NBO Company Shares of Off-trade Sports Drinks: % Volume 2021-2025
Table 118 - LBN Brand Shares of Off-trade Sports Drinks: % Volume 2022-2025
Table 119 - NBO Company Shares of Off-trade Sports Drinks: % Value 2021-2025
Table 120 - LBN Brand Shares of Off-trade Sports Drinks: % Value 2022-2025
Table 121 - Forecast Off-trade Sales of Sports Drinks: Volume 2025-2030
Table 122 - Forecast Off-trade Sales of Sports Drinks: Value 2025-2030
Table 123 - Forecast Off-trade Sales of Sports Drinks: % Volume Growth 2025-2030
Table 124 - Forecast Off-trade Sales of Sports Drinks: % Value Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

About Euromonitor International

Euromonitor International is an independent market intelligence provider. Data, insight and analysis stem from in-the-field research spanning 210 national markets.

Content ranges from the in-depth and country-specific, to key strategic themes with a global range and significance. Products cover a comprehensive range of insights and market data, but can be broadly categorised as:

- **Strategy Briefings:** Global or regional in scope, and focussing on the most important themes shaping consumer demand, the key markets, competitive environment and future outlook across a range of industries.
- **Company Profiles:** Analysis dedicated to the world's most significant companies, with detailed insight into their activities, focus of operations, their competitors, their geographic presence and performance.
- **Country Reports:** For an in-depth understanding of specific countries, whether by industry, economic metrics or consumer trends and lifestyles. These reports cover current trends, consumer demand, market potential and future prospects, with country-specific local insight and comprehensive data, unavailable elsewhere.

For more information on this report, further enquiries can be directed via this link www.euromonitor.com/soft-drinks-in-georgia/report.