



Bottled Water in Ukraine

December 2025

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2025 DEVELOPMENTS

Widespread reliance on bottled water drives double-digit volume growth

INDUSTRY PERFORMANCE

Strong volume growth observed in bottled water

Flavoured bottled water shows dynamism

WHAT'S NEXT?

Positive dynamics will remain despite challenges

Calming functional waters are emerging in Ukraine

Aqua Myrgorod launches functional bottled water with vitamin D3

COMPETITIVE LANDSCAPE

Brand Morshynska remains clear market leader

Vitmark-Ukraine SP TOV makes strong progress

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Supermarkets lead the distribution of bottled water

Health and beauty specialists gain volume share

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Weak economic conditions weigh on overall performance

Changing mindsets and purchasing behaviour impacts soft drinks

Health and ethical aspirations remain strong

WHAT'S NEXT?

Challenging outlook with some grounds for optimism

New sugar tax will result in soft drink reformulations

Convenience stores and retail e-commerce to support sales

COMPETITIVE LANDSCAPE

Oskar Morshynsky ZMV TOV maintains its leading position

Slavutych PBK VAT gains ground in carbonates

National Cashback program supports local manufacturers

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