



# RTD Tea in Ukraine

December 2025

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## RTD Tea in Ukraine - Category analysis

### KEY DATA FINDINGS

#### 2025 DEVELOPMENTS

Ongoing recovery is boosted by niche lines

#### INDUSTRY PERFORMANCE

Still RTD tea is the dominant choice

Kombucha develops well as a niche category

#### WHAT'S NEXT?

Shifting consumer preferences will challenge regular lines as functional lines gain traction

Numerous craft kombucha novelties emerge

Functional RTD tea is launched by craft beer brewery Underwood

#### COMPETITIVE LANDSCAPE

Fuze Tea retains its leading position even as volume share is eroded

Eat Easy TOV enjoys dynamism with its kombucha line

#### CHANNELS

Supermarkets lead with private label holding significant share

Vending sales begin to pick up

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## Soft Drinks in Ukraine - Industry Overview

### EXECUTIVE SUMMARY

Soft drinks continues to show recovery

### KEY DATA FINDINGS

#### INDUSTRY PERFORMANCE

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

## CHANNELS

Supermarkets are primary channel for soft drinks  
Retail e-commerce and variety stores are reshaping distribution  
Foodservice recovery lags behind retail

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