



Soft Drinks in Ukraine

December 2025

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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

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INDUSTRY PERFORMANCE

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WHAT'S NEXT?

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Electrolyte and isotonic health and wellness developments

COMPETITIVE LANDSCAPE

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[Juice in Ukraine](#)

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INDUSTRY PERFORMANCE

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WHAT'S NEXT?

Limited volume growth is predicted as challenges persist

Leading players will bring innovations to the market

Jaffa 100% vegetable mix launches from Vitmark-Ukraine SP TOV

COMPETITIVE LANDSCAPE

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[RTD Coffee in Ukraine](#)

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RTD coffee emerges from a low base

INDUSTRY PERFORMANCE

RTD coffee enjoys growth from low base

Growth is challenged by competition from foodservice and premium price points

WHAT'S NEXT?

RTD coffee is still in high-growth phase of development

Numerous innovations from both local and imported players

Local brand Jaffa adds plant-based offering to new range

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RTD Tea in Ukraine

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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

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2025 DEVELOPMENTS

Dynamic performance for energy drinks

INDUSTRY PERFORMANCE

Energy drinks enjoy dynamism driven by war-related factors
Regular energy drinks are the favoured choice

WHAT'S NEXT?

Future prospects remain positive for energy drinks in Ukraine
Affordable brand Best Shot is gaining popularity
Implementation of sugar tax is expected from 2026

COMPETITIVE LANDSCAPE

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Coca-Cola's Beverages Ukraine witnesses strong performance

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[Sports Drinks in Ukraine](#)

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Reduced-sugar variants are limited for the time being

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Zero sugar options likely to gain mass-market appeal

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