



# Soft Drinks in Uzbekistan

January 2025

Table of Contents

EXECUTIVE SUMMARY

- Soft drinks in 2024: The big picture
- 2024 key trends
- Competitive landscape
- Retailing developments
- Foodservice vs retail split
- What next for soft drinks?

MARKET DATA

- Table 1 - Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: Volume 2019-2024
- Table 2 - Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: % Volume Growth 2019-2024
- Table 3 - Off-trade vs On-trade Sales of Soft Drinks by Channel: Value 2019-2024
- Table 4 - Off-trade vs On-trade Sales of Soft Drinks by Channel: % Value Growth 2019-2024
- Table 5 - Off-trade vs On-trade Sales of Soft Drinks (as sold) by Category: Volume 2024
- Table 6 - Off-trade vs On-trade Sales of Soft Drinks (as sold) by Category: % Volume 2024
- Table 7 - Off-trade vs On-trade Sales of Soft Drinks by Category: Value 2024
- Table 8 - Off-trade vs On-trade Sales of Soft Drinks by Category: % Value 2024
- Table 9 - Off-trade Sales of Soft Drinks (RTD) by Category: Volume 2019-2024
- Table 10 - Off-trade Sales of Soft Drinks (RTD) by Category: % Volume Growth 2019-2024
- Table 11 - Off-trade Sales of Soft Drinks by Category: Value 2019-2024
- Table 12 - Off-trade Sales of Soft Drinks by Category: % Value Growth 2019-2024
- Table 13 - Sales of Soft Drinks by Total Fountain On-trade: Volume 2019-2024
- Table 14 - Sales of Soft Drinks by Total Fountain On-trade: % Volume Growth 2019-2024
- Table 15 - NBO Company Shares of Off-trade Soft Drinks (RTD): % Volume 2020-2024
- Table 16 - LBN Brand Shares of Off-trade Soft Drinks (RTD): % Volume 2021-2024
- Table 17 - NBO Company Shares of Off-trade Soft Drinks: % Value 2020-2024
- Table 18 - LBN Brand Shares of Off-trade Soft Drinks: % Value 2021-2024
- Table 19 - Penetration of Private Label in Off-trade Soft Drinks (RTD) by Category: % Volume 2019-2024
- Table 20 - Penetration of Private Label in Off-trade Soft Drinks by Category: % Value 2019-2024
- Table 21 - Distribution of Off-trade Soft Drinks (as sold) by Format: % Volume 2019-2024
- Table 22 - Distribution of Off-trade Soft Drinks (as sold) by Format and Category: % Volume 2024
- Table 23 - Forecast Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: Volume 2024-2029
- Table 24 - Forecast Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: % Volume Growth 2024-2029
- Table 25 - Forecast Off-trade vs On-trade Sales of Soft Drinks by Channel: Value 2024-2029
- Table 26 - Forecast Off-trade vs On-trade Sales of Soft Drinks by Channel: % Value Growth 2024-2029
- Table 27 - Forecast Off-trade Sales of Soft Drinks (RTD) by Category: Volume 2024-2029
- Table 28 - Forecast Off-trade Sales of Soft Drinks (RTD) by Category: % Volume Growth 2024-2029
- Table 29 - Forecast Off-trade Sales of Soft Drinks by Category: Value 2024-2029
- Table 30 - Forecast Off-trade Sales of Soft Drinks by Category: % Value Growth 2024-2029
- Table 31 - Forecast Sales of Soft Drinks by Total Fountain On-trade: Volume 2024-2029
- Table 32 - Forecast Sales of Soft Drinks by Total Fountain On-trade: % Volume Growth 2024-2029

DISCLAIMER

SOURCES

- Summary 1 - Research Sources

KEY DATA FINDINGS

2024 DEVELOPMENTS

Ongoing shift from tap water drives consumers towards still bottled water  
Flavoured bottled water emerges as a healthier alternative to carbonates  
Local players lead, but innovation is lacking

## PROSPECTS AND OPPORTUNITIES

Concerns over tap-water quality will continue to drive growth  
Flavoured and functional bottled water to grow in popularity as healthier alternatives to carbonates  
Refrigeration will continue to proliferate in both traditional and modern trade outlets

## CATEGORY DATA

Table 33 - Off-trade Sales of Bottled Water by Category: Volume 2019-2024  
Table 34 - Off-trade Sales of Bottled Water by Category: Value 2019-2024  
Table 35 - Off-trade Sales of Bottled Water by Category: % Volume Growth 2019-2024  
Table 36 - Off-trade Sales of Bottled Water by Category: % Value Growth 2019-2024  
Table 37 - NBO Company Shares of Off-trade Bottled Water: % Volume 2020-2024  
Table 38 - LBN Brand Shares of Off-trade Bottled Water: % Volume 2021-2024  
Table 39 - NBO Company Shares of Off-trade Bottled Water: % Value 2020-2024  
Table 40 - LBN Brand Shares of Off-trade Bottled Water: % Value 2021-2024  
Table 41 - Forecast Off-trade Sales of Bottled Water by Category: Volume 2024-2029  
Table 42 - Forecast Off-trade Sales of Bottled Water by Category: Value 2024-2029  
Table 43 - Forecast Off-trade Sales of Bottled Water by Category: % Volume Growth 2024-2029  
Table 44 - Forecast Off-trade Sales of Bottled Water by Category: % Value Growth 2024-2029

## Carbonates in Uzbekistan

## KEY DATA FINDINGS

### 2024 DEVELOPMENTS

Sugar tax undermines growth in off-trade volume sales  
Post-COVID-19 tourism revival continues to boost on-trade volume sales  
Competitively priced local offerings gain off-trade volume share

## PROSPECTS AND OPPORTUNITIES

Possible introduction of sales restrictions could hamper off-trade volume growth  
Social media to play a more important role in marketing, particularly for smaller companies  
Supermarkets will continue to grow in importance as a distribution channel

## CATEGORY DATA

Table 45 - Off-trade vs On-trade Sales of Carbonates: Volume 2019-2024  
Table 46 - Off-trade vs On-trade Sales of Carbonates: Value 2019-2024  
Table 47 - Off-trade vs On-trade Sales of Carbonates: % Volume Growth 2019-2024  
Table 48 - Off-trade vs On-trade Sales of Carbonates: % Value Growth 2019-2024  
Table 49 - Off-trade Sales of Carbonates by Category: Volume 2019-2024  
Table 50 - Off-trade Sales of Carbonates by Category: Value 2019-2024  
Table 51 - Off-trade Sales of Carbonates by Category: % Volume Growth 2019-2024  
Table 52 - Off-trade Sales of Carbonates by Category: % Value Growth 2019-2024  
Table 53 - Sales of Carbonates by Total Fountain On-trade: Volume 2019-2024  
Table 54 - Sales of Carbonates by Total Fountain On-trade: % Volume Growth 2019-2024  
Table 55 - NBO Company Shares of Off-trade Carbonates: % Volume 2020-2024  
Table 56 - LBN Brand Shares of Off-trade Carbonates: % Volume 2021-2024  
Table 57 - NBO Company Shares of Off-trade Carbonates: % Value 2020-2024  
Table 58 - LBN Brand Shares of Off-trade Carbonates: % Value 2021-2024  
Table 59 - Forecast Off-trade Sales of Carbonates by Category: Volume 2024-2029  
Table 60 - Forecast Off-trade Sales of Carbonates by Category: Value 2024-2029

Table 61 - Forecast Off-trade Sales of Carbonates by Category: % Volume Growth 2024-2029

Table 62 - Forecast Off-trade Sales of Carbonates by Category: % Value Growth 2024-2029

Table 63 - Forecast Sales of Carbonates by Total Fountain On-trade: Volume 2024-2029

Table 64 - Forecast Sales of Carbonates by Total Fountain On-trade: % Volume Growth 2024-2029

## Juice in Uzbekistan

### KEY DATA FINDINGS

#### 2024 DEVELOPMENTS

New participants energise off-trade volume sales

Juice drinks still largely perceived as an indulgence

Strong distribution and regular product updates help local brands thrive

### PROSPECTS AND OPPORTUNITIES

Off-trade volume sales will surpass their 2019 peak

Juice drinks will continue to outperform 100% juice and nectars

In-store refrigeration will continue to grow in importance as a sales driver

### CATEGORY DATA

Table 65 - Off-trade Sales of Juice by Category: Volume 2019-2024

Table 66 - Off-trade Sales of Juice by Category: Value 2019-2024

Table 67 - Off-trade Sales of Juice by Category: % Volume Growth 2019-2024

Table 68 - Off-trade Sales of Juice by Category: % Value Growth 2019-2024

Table 69 - NBO Company Shares of Off-trade Juice: % Volume 2020-2024

Table 70 - LBN Brand Shares of Off-trade Juice: % Volume 2021-2024

Table 71 - NBO Company Shares of Off-trade Juice: % Value 2020-2024

Table 72 - LBN Brand Shares of Off-trade Juice: % Value 2021-2024

Table 73 - Forecast Off-trade Sales of Juice by Category: Volume 2024-2029

Table 74 - Forecast Off-trade Sales of Juice by Category: Value 2024-2029

Table 75 - Forecast Off-trade Sales of Juice by Category: % Volume Growth 2024-2029

Table 76 - Forecast Off-trade Sales of Juice by Category: % Value Growth 2024-2029

## RTD Tea in Uzbekistan

### KEY DATA FINDINGS

#### 2024 DEVELOPMENTS

Growth in off-trade volume sales slows amid mounting economic headwinds

Deep-rooted tea-drinking culture supports demand for RTD tea

Global brands Lipton Tea and Fuse Tea continue to grow in importance

### PROSPECTS AND OPPORTUNITIES

Young adults seeking alternatives to carbonates will remain key growth drivers

Carbonated RTD tea to remain underdeveloped

Proliferation of refrigeration in retail outlets will continue to support demand growth

### CATEGORY DATA

Table 77 - Off-trade Sales of RTD Tea by Category: Volume 2019-2024

Table 78 - Off-trade Sales of RTD Tea by Category: Value 2019-2024

Table 79 - Off-trade Sales of RTD Tea by Category: % Volume Growth 2019-2024

Table 80 - Off-trade Sales of RTD Tea by Category: % Value Growth 2019-2024

Table 81 - NBO Company Shares of Off-trade RTD Tea: % Volume 2020-2024

Table 82 - LBN Brand Shares of Off-trade RTD Tea: % Volume 2021-2024

Table 83 - NBO Company Shares of Off-trade RTD Tea: % Value 2020-2024

Table 84 - LBN Brand Shares of Off-trade RTD Tea: % Value 2021-2024

Table 85 - Forecast Off-trade Sales of RTD Tea by Category: Volume 2024-2029

Table 86 - Forecast Off-trade Sales of RTD Tea by Category: Value 2024-2029

Table 87 - Forecast Off-trade Sales of RTD Tea by Category: % Volume Growth 2024-2029

Table 88 - Forecast Off-trade Sales of RTD Tea by Category: % Value Growth 2024-2029

Energy Drinks in Uzbekistan

KEY DATA FINDINGS

2024 DEVELOPMENTS

- Introduction of excise tax hammers growth in off-trade volume sales
- New flavours and entrants support category growth
- Frequent product updates and heavy marketing help Flash Up stay on top

PROSPECTS AND OPPORTUNITIES

- Regulation poses a threat to growth
- As competition intensifies, live events and social media will remain key marketing tools
- Reduced sugar energy drinks will remain a niche

CATEGORY DATA

Table 89 - Off-trade Sales of Energy Drinks: Volume 2019-2024

Table 90 - Off-trade Sales of Energy Drinks: Value 2019-2024

Table 91 - Off-trade Sales of Energy Drinks: % Volume Growth 2019-2024

Table 92 - Off-trade Sales of Energy Drinks: % Value Growth 2019-2024

Table 93 - NBO Company Shares of Off-trade Energy Drinks: % Volume 2020-2024

Table 94 - LBN Brand Shares of Off-trade Energy Drinks: % Volume 2021-2024

Table 95 - NBO Company Shares of Off-trade Energy Drinks: % Value 2020-2024

Table 96 - LBN Brand Shares of Off-trade Energy Drinks: % Value 2021-2024

Table 97 - Forecast Off-trade Sales of Energy Drinks: Volume 2024-2029

Table 98 - Forecast Off-trade Sales of Energy Drinks: Value 2024-2029

Table 99 - Forecast Off-trade Sales of Energy Drinks: % Volume Growth 2024-2029

Table 100 - Forecast Off-trade Sales of Energy Drinks: % Value Growth 2024-2029

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-uzbekistan/report](http://www.euromonitor.com/soft-drinks-in-uzbekistan/report).