



# Juice in Kazakhstan

December 2025

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## Juice in Kazakhstan - Category analysis

### KEY DATA FINDINGS

#### 2025 DEVELOPMENTS

Little room for more premium offerings

#### INDUSTRY PERFORMANCE

Minimal volume growth, though some recovery from previous years

Juice drinks (up to 24% juice) gain most volume share

#### WHAT'S NEXT?

Minimal volume growth, with consumers still price sensitive

Flavour key driver of differentiation

Not from concentrates 100% juice continues to be niche

#### COMPETITIVE LANDSCAPE

RG Brands holds on to commanding lead

Galanz Bottlers gains most volume share

#### CHANNELS

Small local grocers lead retail distribution, but are losing volume share

Significant volume sales through foodservice

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2025 marks a recovery, as inflation eases

### KEY DATA FINDINGS

#### INDUSTRY PERFORMANCE

Recovery, after previous difficult year

Consumers still price sensitive

RTD tea strongest performer

Continuing flavour innovation

#### WHAT'S NEXT?

Moderate volume growth over forecast period

Continuing price sensitivity

Continuing regulatory pressure on energy drinks

## COMPETITIVE LANDSCAPE

Coca-Cola holds on to commanding lead and makes strong recovery after difficult 2024

RG Brands has significant foothold

## CHANNELS

Small local grocers lead, but lose value share

E-commerce and convenience stores register healthy value growth

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## SOURCES

Summary 1 - Research Sources

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