Soft Drinks in Iraq

March 2026

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Soft Drinks in Iraq

EXECUTIVE SUMMARY

Soft drinks consumption rises as heat and bottled water reliance lift demand

KEY DATA FINDINGS

INDUSTRY PERFORMANCE

Strong growth seen in 2025

Price sensitivity high as supply expands and offers converge

Bottled water reliance intensifies as infrastructure constraints deepen

Category demand varies by occasion, seasonality and lifestyle

New launches struggle outside RTD as consumer preferences stay pragmatic

Health and sustainability awareness rises, but behaviour shifts remain gradual

Local production expands under policy support, despite regulation and distribution frictions

WHAT'S NEXT?

Volume growth to stay strong as bottled water keeps essential role

Local production expansion amid both consolidation and fragmentation

Differentiation and health-led shifts to become more influential

COMPETITIVE LANDSCAPE

UB Holding leads through bottled water scale while Nestlé gains momentum in RTD

Price-led competition persists amid broad availability and operational complexity

CHANNELS

Small local grocers remain dominant channel alongside informal trade

On trade holds substantial share of sales as cafés expand

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COUNTRY REPORTS DISCLAIMER

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Carbonates sees robust growth amid high heat and low prices
Industry performance
Iraq's carbonates volume sales rise strongly in 2025
Pricing pressure eases, but high costs reshape competition
Health awareness rises slowly, benefiting reduced-sugar options
What's next?
Demand growth will persist as urban living drives frequency
Reduced-sugar variants to gain ground thanks to stronger health influence
Retail execution becomes decisive while costs rise and premiums emerge
Competitive landscape
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Fresh juice culture shapes packaged demand and skews premiumisation
Health positioning supports demand, but sugar content limits credibility of juice drinks
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Volume growth to continue amid persistent structural constraints

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Full potential stays out of reach without investment and stronger capabilities
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Tap water quality issues keep bottled water essential
Prices stay low as domestic production scales up
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Local supply dominates as fragmentation persists across regions
Sustainability and quality concerns gain visibility, but packaging shifts stay gradual
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Health concerns and illicit trade create uncertainty, but do not curb demand materially
What's next?
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Pricing and distribution will keep defining success as local production expands
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Industry performance
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High inflation and low essentiality keep category narrow
Availability and refrigeration needs constrain distribution reach
What's next?
Volume growth to moderates as price remains main limiter
Health-led positioning supports expansion and pushes lower-sugar options
Development to continue, but limited investment curbs full potential
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