



Euromonitor
International

Concentrates in Kazakhstan

December 2025

Table of Contents

KEY DATA FINDINGS

2025 DEVELOPMENTS

Limited interest in concentrates

INDUSTRY PERFORMANCE

Marginal volume decline in 2025
Liquid concentrates gain most volume share

WHAT'S NEXT

Growth flat over forecast period
Limited innovation sees concentrates continuing to struggle
Opportunities in focusing on a healthier positioning

COMPETITIVE LANDSCAPE

Russian and local companies dominate
Smaller players come and go

CHANNELS

Differing distribution for liquid and powder concentrates
Convenience stores and e-commerce register healthy volume growth
Concentrates Conversions
Summary 1 - Concentrates Conversion Factors for Ready-to-Drink (RTD) Format

CATEGORY DATA

- Table 1 - Off-trade Sales of Concentrates (RTD) by Category: Volume 2020-2025
- Table 2 - Off-trade Sales of Concentrates by Category: Value 2020-2025
- Table 3 - Off-trade Sales of Concentrates (RTD) by Category: % Volume Growth 2020-2025
- Table 4 - Off-trade Sales of Concentrates by Category: % Value Growth 2020-2025
- Table 5 - NBO Company Shares of Off-trade Concentrates (RTD): % Volume 2021-2025
- Table 6 - LBN Brand Shares of Off-trade Concentrates (RTD): % Volume 2022-2025
- Table 7 - NBO Company Shares of Off-trade Concentrates: % Value 2021-2025
- Table 8 - LBN Brand Shares of Off-trade Concentrates: % Value 2022-2025
- Table 9 - NBO Company Shares of Off-trade Liquid Concentrates (RTD): % Volume 2021-2025
- Table 10 - LBN Brand Shares of Off-trade Liquid Concentrates (RTD): % Volume 2022-2025
- Table 11 - NBO Company Shares of Off-trade Powder Concentrates (RTD): % Volume 2021-2025
- Table 12 - LBN Brand Shares of Off-trade Powder Concentrates (RTD): % Volume 2022-2025
- Table 13 - Forecast Off-trade Sales of Concentrates (RTD) by Category: Volume 2025-2030
- Table 14 - Forecast Off-trade Sales of Concentrates by Category: Value 2025-2030
- Table 15 - Forecast Off-trade Sales of Concentrates (RTD) by Category: % Volume Growth 2025-2030
- Table 16 - Forecast Off-trade Sales of Concentrates by Category: % Value Growth 2025-2030

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EXECUTIVE SUMMARY

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
Foodservice vs retail split

MARKET DATA

Table 17 - Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: Volume 2020-2025
Table 18 - Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: % Volume Growth 2020-2025
Table 19 - Off-trade vs On-trade Sales of Soft Drinks by Channel: Value 2020-2025
Table 20 - Off-trade vs On-trade Sales of Soft Drinks by Channel: % Value Growth 2020-2025
Table 21 - Off-trade vs On-trade Sales of Soft Drinks (as sold) by Category: Volume 2025
Table 22 - Off-trade vs On-trade Sales of Soft Drinks (as sold) by Category: % Volume 2025
Table 23 - Off-trade vs On-trade Sales of Soft Drinks by Category: Value 2025
Table 24 - Off-trade vs On-trade Sales of Soft Drinks by Category: % Value 2025
Table 25 - Off-trade Sales of Soft Drinks (RTD) by Category: Volume 2020-2025
Table 26 - Off-trade Sales of Soft Drinks (RTD) by Category: % Volume Growth 2020-2025
Table 27 - Off-trade Sales of Soft Drinks by Category: Value 2020-2025
Table 28 - Off-trade Sales of Soft Drinks by Category: % Value Growth 2020-2025
Table 29 - Sales of Soft Drinks by Total Fountain On-trade: Volume 2020-2025
Table 30 - Sales of Soft Drinks by Total Fountain On-trade: % Volume Growth 2020-2025
Table 31 - NBO Company Shares of Off-trade Soft Drinks (RTD): % Volume 2021-2025
Table 32 - LBN Brand Shares of Off-trade Soft Drinks (RTD): % Volume 2022-2025
Table 33 - NBO Company Shares of Off-trade Soft Drinks: % Value 2021-2025
Table 34 - LBN Brand Shares of Off-trade Soft Drinks: % Value 2022-2025
Table 35 - Penetration of Private Label in Off-trade Soft Drinks (RTD) by Category: % Volume 2020-2025
Table 36 - Penetration of Private Label in Off-trade Soft Drinks by Category: % Value 2020-2025
Table 37 - Distribution of Off-trade Soft Drinks (as sold) by Format: % Volume 2020-2025
Table 38 - Distribution of Off-trade Soft Drinks (as sold) by Format and Category: % Volume 2025
Table 39 - Forecast Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: Volume 2025-2030
Table 40 - Forecast Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: % Volume Growth 2025-2030
Table 41 - Forecast Off-trade vs On-trade Sales of Soft Drinks by Channel: Value 2025-2030
Table 42 - Forecast Off-trade vs On-trade Sales of Soft Drinks by Channel: % Value Growth 2025-2030
Table 43 - Forecast Off-trade Sales of Soft Drinks (RTD) by Category: Volume 2025-2030
Table 44 - Forecast Off-trade Sales of Soft Drinks (RTD) by Category: % Volume Growth 2025-2030
Table 45 - Forecast Off-trade Sales of Soft Drinks by Category: Value 2025-2030
Table 46 - Forecast Off-trade Sales of Soft Drinks by Category: % Value Growth 2025-2030
Table 47 - Forecast Sales of Soft Drinks by Total Fountain On-trade: Volume 2025-2030
Table 48 - Forecast Sales of Soft Drinks by Total Fountain On-trade: % Volume Growth 2025-2030

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SOURCES

Summary 2 - Research Sources

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