



**Euromonitor
International**

Soft Drinks in Kazakhstan

December 2025

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EXECUTIVE SUMMARY

2025 marks a recovery, as inflation eases

KEY DATA FINDINGS

INDUSTRY PERFROMANCE

- 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

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2025 DEVELOPMENTS

Ongoing issues with tap water support volume sales

INDUSTRY PERFORMANCE

Continuing volume growth for bottled water

Flavoured bottled water registers highest volume growth

WHAT'S NEXT?

Further healthy volume growth

Minimal innovation over forecast period

Limited demand for functional bottled water as yet

COMPETITIVE LANDSCAPE

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[Carbonates in Kazakhstan](#)

KEY DATA FINDINGS

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Healthy volume growth

INDUSTRY PERFORMANCE

Recovery for carbonates in 2025

Tonic Water/mixers/other bitters registers highest volume growth

WHAT'S NEXT?

Modest volume growth over forecast period

Flavour innovations keep consumers engaged

Reduced sugar fails to gain traction

COMPETITIVE LANDSCAPE

Coca-Cola continues to dominate, with PepsiCo in second position

Some smaller players making an impact

CHANNELS

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[Concentrates in Kazakhstan](#)

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

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[Juice in Kazakhstan](#)

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

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[RTD Coffee in Kazakhstan](#)

KEY DATA FINDINGS

2025 DEVELOPMENTS

RTD coffee still an emerging product

INDUSTRY PERFORMANCE

Healthy volume growth in 2025
Volume sales continue to be low

WHAT'S NEXT

Lower growth over forecast
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Younger consumers drive volume growth

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RTD Tea in Kazakhstan

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2025 DEVELOPMENTS

RTD tea best performing soft drink in 2025

INDUSTRY PERFORMANCE

Continuing thirst for RTD tea

Flavour innovation key driver of sales

WHAT'S NEXT?

Rosy outlook over forecast period

Continuing focus on flavours

Little demand for reduced sugar offerings

COMPETITIVE LANDSCAPE

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

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Energy Drinks in Kazakhstan

KEY DATA FINDINGS

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INDUSTRY PERFORMANCE

Further volume growth, despite ban on sales to under 21-year-olds

Reduced sugar energy drinks gain the most volume share

WHAT'S NEXT?

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Innovation, affordability and effective marketing drive volume sales

Further restrictions possible

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Significant volume sales through foodservice

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