



Carbonates in Pakistan

December 2025

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2025 DEVELOPMENTS

Carbonates stabilises as brands rebuild momentum

INDUSTRY PERFORMANCE

Demand stabilises as boycotts ease

Lemonade/lime leads growth

WHAT'S NEXT?

Product innovation will be key growth driver

Customer engagement will be key focus

Sustainability will be central to brand strategies

COMPETITIVE LANDSCAPE

Multinationals remain dominant

Mehran Bottlers leads growth

CHANNELS

Small local grocers remain vital, especially in lower-income areas

Hypermarkets and e-commerce expand from low base

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Urbanisation and channel expansion fuel consumption

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Favourable economic conditions and demographics boost demand for soft drinks

Health and wellness trends shape consumption habits

Retail expansion improves product accessibility

WHAT'S NEXT?

Stabilising economy will boost demand

Expected shift towards healthier offerings

Expansion of modern retail will increase access to packaged soft drinks

COMPETITIVE LANDSCAPE

Multinational giants hold sway

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