



Carbonates in Ukraine

December 2025

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2025 DEVELOPMENTS

Carbonates enjoy further recovery in volumes

INDUSTRY PERFORMANCE

Global and local brands act to maintain appeal of carbonates

Tonics are among the best-sellers in carbonates

WHAT'S NEXT?

Bright outlook for carbonates driven by wide range of consumption occasions

Kvas has strong potential following revival

Implementation of sugar tax is expected from 2026

COMPETITIVE LANDSCAPE

PepsiCo and Coca-Cola compete closely for leadership in Carbonates

Slavutych PBK VAT is fastest growing player

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Soft Drinks in Ukraine - Industry Overview

EXECUTIVE SUMMARY

Soft drinks continues to show recovery

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INDUSTRY PERFORMANCE

Weak economic conditions weigh on overall performance
Changing mindsets and purchasing behaviour impacts soft drinks
Health and ethical aspirations remain strong

WHAT'S NEXT?

Challenging outlook with some grounds for optimism
New sugar tax will result in soft drink reformulations
Convenience stores and retail e-commerce to support sales

COMPETITIVE LANDSCAPE

Oskar Morshynsky ZMV TOV maintains its leading position
Slavutych PBK VAT gains ground in carbonates
National Cashback program supports local manufacturers

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