



Euromonitor
International

Soft Drinks in Pakistan

December 2025

Table of Contents

EXECUTIVE SUMMARY

Urbanisation and channel expansion fuel consumption

KEY DATA FINDINGS

INDUSTRY PERFORMANCE

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

Mehran Bottlers is most dynamic player

CHANNELS

Small local grocers lead sales

E-commerce and modern grocery outlets enhance product availability

Foodservice vs retail split

MARKET DATA

Table 1 - Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: Volume 2020-2025

Table 2 - Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: % Volume Growth 2020-2025

Table 3 - Off-trade vs On-trade Sales of Soft Drinks by Channel: Value 2020-2025

Table 4 - Off-trade vs On-trade Sales of Soft Drinks by Channel: % Value Growth 2020-2025

Table 5 - Off-trade vs On-trade Sales of Soft Drinks (as sold) by Category: Volume 2025

Table 6 - Off-trade vs On-trade Sales of Soft Drinks (as sold) by Category: % Volume 2025

Table 7 - Off-trade vs On-trade Sales of Soft Drinks by Category: Value 2025

Table 8 - Off-trade vs On-trade Sales of Soft Drinks by Category: % Value 2025

Table 9 - Off-trade Sales of Soft Drinks (RTD) by Category: Volume 2020-2025

Table 10 - Off-trade Sales of Soft Drinks (RTD) by Category: % Volume Growth 2020-2025

Table 11 - Off-trade Sales of Soft Drinks by Category: Value 2020-2025

Table 12 - Off-trade Sales of Soft Drinks by Category: % Value Growth 2020-2025

Table 13 - Sales of Soft Drinks by Total Fountain On-trade: Volume 2020-2025

Table 14 - Sales of Soft Drinks by Total Fountain On-trade: % Volume Growth 2020-2025

Table 15 - NBO Company Shares of Off-trade Soft Drinks (RTD): % Volume 2021-2025

Table 16 - LBN Brand Shares of Off-trade Soft Drinks (RTD): % Volume 2022-2025

Table 17 - NBO Company Shares of Off-trade Soft Drinks: % Value 2021-2025

Table 18 - LBN Brand Shares of Off-trade Soft Drinks: % Value 2022-2025

Table 19 - Penetration of Private Label in Off-trade Soft Drinks (RTD) by Category: % Volume 2020-2025

Table 20 - Penetration of Private Label in Off-trade Soft Drinks by Category: % Value 2020-2025

Table 21 - Distribution of Off-trade Soft Drinks (as sold) by Format: % Volume 2020-2025

Table 22 - Distribution of Off-trade Soft Drinks (as sold) by Format and Category: % Volume 2025

Table 23 - Forecast Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: Volume 2025-2030

Table 24 - Forecast Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: % Volume Growth 2025-2030

Table 25 - Forecast Off-trade vs On-trade Sales of Soft Drinks by Channel: Value 2025-2030

Table 26 - Forecast Off-trade vs On-trade Sales of Soft Drinks by Channel: % Value Growth 2025-2030

Table 27 - Forecast Off-trade Sales of Soft Drinks (RTD) by Category: Volume 2025-2030

Table 28 - Forecast Off-trade Sales of Soft Drinks (RTD) by Category: % Volume Growth 2025-2030

Table 29 - Forecast Off-trade Sales of Soft Drinks by Category: Value 2025-2030

Table 30 - Forecast Off-trade Sales of Soft Drinks by Category: % Value Growth 2025-2030

Table 31 - Forecast Sales of Soft Drinks by Total Fountain On-trade: Volume 2025-2030

Table 32 - Forecast Sales of Soft Drinks by Total Fountain On-trade: % Volume Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

SOURCES

Summary 1 - Research Sources

[Bottled Water in Pakistan](#)

KEY DATA FINDINGS

2025 DEVELOPMENTS

Health, convenience and innovation drive demand

INDUSTRY PERFORMANCE

Still purified bottled water dominates sales

Rise of restaurant-branded offerings

WHAT'S NEXT?

Bottled water offers scope for further diversification

Technological advancements will lead to greater consistency

Sustainability will become key manufacturer and customer focus

COMPETITIVE LANDSCAPE

Nestlé maintains dominance

Mehran Bottlers leverages existing consumer trust and distribution network

CHANNELS

Traditional stores remain key to sales

Modern retail formats appeal to convenience-seeking buyers

CATEGORY DATA

Table 33 - Off-trade Sales of Bottled Water by Category: Volume 2020-2025

Table 34 - Off-trade Sales of Bottled Water by Category: Value 2020-2025

Table 35 - Off-trade Sales of Bottled Water by Category: % Volume Growth 2020-2025

Table 36 - Off-trade Sales of Bottled Water by Category: % Value Growth 2020-2025

Table 37 - NBO Company Shares of Off-trade Bottled Water: % Volume 2021-2025

Table 38 - LBN Brand Shares of Off-trade Bottled Water: % Volume 2022-2025

Table 39 - NBO Company Shares of Off-trade Bottled Water: % Value 2021-2025

Table 40 - LBN Brand Shares of Off-trade Bottled Water: % Value 2022-2025

Table 41 - Forecast Off-trade Sales of Bottled Water by Category: Volume 2025-2030

Table 42 - Forecast Off-trade Sales of Bottled Water by Category: Value 2025-2030

Table 43 - Forecast Off-trade Sales of Bottled Water by Category: % Volume Growth 2025-2030

Table 44 - Forecast Off-trade Sales of Bottled Water by Category: % Value Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

[Carbonates in Pakistan](#)

KEY DATA FINDINGS

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

CATEGORY DATA

Table 45 - Off-trade vs On-trade Sales of Carbonates: Volume 2020-2025

Table 46 - Off-trade vs On-trade Sales of Carbonates: Value 2020-2025

Table 47 - Off-trade vs On-trade Sales of Carbonates: % Volume Growth 2020-2025

Table 48 - Off-trade vs On-trade Sales of Carbonates: % Value Growth 2020-2025

Table 49 - Off-trade Sales of Carbonates by Category: Volume 2020-2025

Table 50 - Off-trade Sales of Carbonates by Category: Value 2020-2025

Table 51 - Off-trade Sales of Carbonates by Category: % Volume Growth 2020-2025

Table 52 - Off-trade Sales of Carbonates by Category: % Value Growth 2020-2025

Table 53 - Sales of Carbonates by Total Fountain On-trade: Volume 2020-2025

Table 54 - Sales of Carbonates by Total Fountain On-trade: % Volume Growth 2020-2025

Table 55 - NBO Company Shares of Off-trade Carbonates: % Volume 2021-2025

Table 56 - LBN Brand Shares of Off-trade Carbonates: % Volume 2022-2025

Table 57 - NBO Company Shares of Off-trade Carbonates: % Value 2021-2025

Table 58 - LBN Brand Shares of Off-trade Carbonates: % Value 2022-2025

Table 59 - Forecast Off-trade Sales of Carbonates by Category: Volume 2025-2030

Table 60 - Forecast Off-trade Sales of Carbonates by Category: Value 2025-2030

Table 61 - Forecast Off-trade Sales of Carbonates by Category: % Volume Growth 2025-2030

Table 62 - Forecast Off-trade Sales of Carbonates by Category: % Value Growth 2025-2030

Table 63 - Forecast Sales of Carbonates by Total Fountain On-trade: Volume 2025-2030

Table 64 - Forecast Sales of Carbonates by Total Fountain On-trade: % Volume Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

[Concentrates in Pakistan](#)

KEY DATA FINDINGS

2025 DEVELOPMENTS

Affordability drives growth

INDUSTRY PERFORMANCE

Ongoing consumer price consciousness sustains demand

Powder concentrates leads growth

WHAT'S NEXT?

Concentrates poised for further growth, driven by convenience and accessibility

Health trends will spark wellness-driven innovation

Potential lies with foodservice operators

COMPETITIVE LANDSCAPE

Local brands lead liquid concentrates

Mondelez dominates powder variants

CHANNELS

Small local grocers remains dominant channel

E-commerce shows rapid growth

Concentrates Conversions

Summary 2 - Concentrates Conversion Factors for Ready-to-Drink (RTD) Format

CATEGORY DATA

Table 65 - Off-trade Sales of Concentrates (RTD) by Category: Volume 2020-2025

Table 66 - Off-trade Sales of Concentrates by Category: Value 2020-2025

Table 67 - Off-trade Sales of Concentrates (RTD) by Category: % Volume Growth 2020-2025

Table 68 - Off-trade Sales of Concentrates by Category: % Value Growth 2020-2025

Table 69 - NBO Company Shares of Off-trade Concentrates (RTD): % Volume 2021-2025

Table 70 - LBN Brand Shares of Off-trade Concentrates (RTD): % Volume 2022-2025

Table 71 - NBO Company Shares of Off-trade Concentrates: % Value 2021-2025

Table 72 - LBN Brand Shares of Off-trade Concentrates: % Value 2022-2025

Table 73 - NBO Company Shares of Off-trade Liquid Concentrates (RTD): % Volume 2021-2025

Table 74 - LBN Brand Shares of Off-trade Liquid Concentrates (RTD): % Volume 2022-2025

Table 75 - NBO Company Shares of Off-trade Powder Concentrates (RTD): % Volume 2021-2025

Table 76 - LBN Brand Shares of Off-trade Powder Concentrates (RTD): % Volume 2022-2025

Table 77 - Forecast Off-trade Sales of Concentrates (RTD) by Category: Volume 2025-2030

Table 78 - Forecast Off-trade Sales of Concentrates by Category: Value 2025-2030

Table 79 - Forecast Off-trade Sales of Concentrates (RTD) by Category: % Volume Growth 2025-2030

Table 80 - Forecast Off-trade Sales of Concentrates by Category: % Value Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

[Juice in Pakistan](#)

KEY DATA FINDINGS

2025 DEVELOPMENTS

Premium and on-the-go juice formats gain momentum

INDUSTRY PERFORMANCE

Greater economic stability boost sales

Not from concentrate 100% juice makes full recovery

WHAT'S NEXT?

Positive outlook for juice

Health and wellness trend will impact consumer preferences

Foodservice channel will be key growth driver

COMPETITIVE LANDSCAPE

Nestle retains leading position

Shezan International gains traction with All Pure Tropical Nectar

CHANNELS

Small local grocers benefit from extensive reach
E-commerce gains traction amongst time-pressed urban consumers

CATEGORY DATA

Table 81 - Off-trade Sales of Juice by Category: Volume 2020-2025
Table 82 - Off-trade Sales of Juice by Category: Value 2020-2025
Table 83 - Off-trade Sales of Juice by Category: % Volume Growth 2020-2025
Table 84 - Off-trade Sales of Juice by Category: % Value Growth 2020-2025
Table 85 - NBO Company Shares of Off-trade Juice: % Volume 2021-2025
Table 86 - LBN Brand Shares of Off-trade Juice: % Volume 2022-2025
Table 87 - NBO Company Shares of Off-trade Juice: % Value 2021-2025
Table 88 - LBN Brand Shares of Off-trade Juice: % Value 2022-2025
Table 89 - Forecast Off-trade Sales of Juice by Category: Volume 2025-2030
Table 90 - Forecast Off-trade Sales of Juice by Category: Value 2025-2030
Table 91 - Forecast Off-trade Sales of Juice by Category: % Volume Growth 2025-2030
Table 92 - Forecast Off-trade Sales of Juice by Category: % Value Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

RTD Coffee in Pakistan

KEY DATA FINDINGS

2025 DEVELOPMENTS

RTD coffee remains niche product

INDUSTRY PERFORMANCE

RTD coffee fails to take off in price-sensitive market
Young urban adults drive demand

WHAT'S NEXT?

RTD still offers considerable potential
Manufacturing advancements will lead to wider availability
Potential for health and wellness-oriented offerings

COMPETITIVE LANDSCAPE

Nestle continues as category leader
RTD coffee is perceived as risky venture for new entrants

CHANNELS

Small local grocers lead sales
E-commerce gains traction

CATEGORY DATA

Table 93 - Off-trade Sales of RTD Coffee: Volume 2020-2025
Table 94 - Off-trade Sales of RTD Coffee: Value 2020-2025
Table 95 - Off-trade Sales of RTD Coffee: % Volume Growth 2020-2025
Table 96 - Off-trade Sales of RTD Coffee: % Value Growth 2020-2025
Table 97 - NBO Company Shares of Off-trade RTD Coffee: % Volume 2021-2025
Table 98 - LBN Brand Shares of Off-trade RTD Coffee: % Volume 2022-2025
Table 99 - NBO Company Shares of Off-trade RTD Coffee: % Value 2021-2025
Table 100 - LBN Brand Shares of Off-trade RTD Coffee: % Value 2022-2025
Table 101 - Forecast Off-trade Sales of RTD Coffee: Volume 2025-2030
Table 102 - Forecast Off-trade Sales of RTD Coffee: Value 2025-2030

Table 103 - Forecast Off-trade Sales of RTD Coffee: % Volume Growth 2025-2030

Table 104 - Forecast Off-trade Sales of RTD Coffee: % Value Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

RTD Tea in Pakistan

KEY DATA FINDINGS

2025 DEVELOPMENTS

Cultural preference for hot tea restricts sales

INDUSTRY PERFORMANCE

RTD tea sees solid growth from low base

Reduced sugar variants remain underdeveloped

WHAT'S NEXT?

Retail modernisation and growing demand for convenience will boost sales

Premiumisation offers untapped opportunities

Sustainable packaging could become key differentiator

COMPETITIVE LANDSCAPE

Lipton remains only notable player in RTD tea

Competition remains limited

CHANNELS

Small local grocers retain vital role

Modern grocery retailers and e-commerce enhance visibility of RTD offerings

CATEGORY DATA

Table 105 - Off-trade Sales of RTD Tea by Category: Volume 2020-2025

Table 106 - Off-trade Sales of RTD Tea by Category: Value 2020-2025

Table 107 - Off-trade Sales of RTD Tea by Category: % Volume Growth 2020-2025

Table 108 - Off-trade Sales of RTD Tea by Category: % Value Growth 2020-2025

Table 109 - NBO Company Shares of Off-trade RTD Tea: % Volume 2021-2025

Table 110 - LBN Brand Shares of Off-trade RTD Tea: % Volume 2022-2025

Table 111 - NBO Company Shares of Off-trade RTD Tea: % Value 2021-2025

Table 112 - LBN Brand Shares of Off-trade RTD Tea: % Value 2022-2025

Table 113 - Forecast Off-trade Sales of RTD Tea by Category: Volume 2025-2030

Table 114 - Forecast Off-trade Sales of RTD Tea by Category: Value 2025-2030

Table 115 - Forecast Off-trade Sales of RTD Tea by Category: % Volume Growth 2025-2030

Table 116 - Forecast Off-trade Sales of RTD Tea by Category: % Value Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

Energy Drinks in Pakistan

KEY DATA FINDINGS

2025 DEVELOPMENTS

Fast-paced lifestyles support growing sales

INDUSTRY PERFORMANCE

Young, urban consumers drive demand

Reduced sugar variants remain limited

WHAT'S NEXT?

Young Pakistanis will continue as core consumer base
Digitalisation to unlock significant growth opportunities
Health and wellness trends will prompt players to reposition their offerings

COMPETITIVE LANDSCAPE

Sting remains market leader
Red Bull has niche appeal

CHANNELS

Traditional retailers dominate sales
E-commerce is most dynamic channel

CATEGORY DATA

Table 117 - Off-trade Sales of Energy Drinks: Volume 2020-2025
Table 118 - Off-trade Sales of Energy Drinks: Value 2020-2025
Table 119 - Off-trade Sales of Energy Drinks: % Volume Growth 2020-2025
Table 120 - Off-trade Sales of Energy Drinks: % Value Growth 2020-2025
Table 121 - NBO Company Shares of Off-trade Energy Drinks: % Volume 2021-2025
Table 122 - LBN Brand Shares of Off-trade Energy Drinks: % Volume 2022-2025
Table 123 - NBO Company Shares of Off-trade Energy Drinks: % Value 2021-2025
Table 124 - LBN Brand Shares of Off-trade Energy Drinks: % Value 2022-2025
Table 125 - Forecast Off-trade Sales of Energy Drinks: Volume 2025-2030
Table 126 - Forecast Off-trade Sales of Energy Drinks: Value 2025-2030
Table 127 - Forecast Off-trade Sales of Energy Drinks: % Volume Growth 2025-2030
Table 128 - Forecast Off-trade Sales of Energy Drinks: % Value Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

Sports Drinks in Pakistan

KEY DATA FINDINGS

2025 DEVELOPMENTS

Rising fitness culture drives growth

INDUSTRY PERFORMANCE

Growing popularity of padel tennis boosts sales
Category remains underdeveloped

WHAT'S NEXT?

Rising fitness culture will support increase in sales
Shift towards functional positioning
Convenient distribution channels will be key to expansion of sports drinks

COMPETITIVE LANDSCAPE

PepsiCo retains its sales monopoly
Gatorade leverages new sales opportunities

CHANNELS

Small local grocers retain leading share
E-commerce expands from low base

CATEGORY DATA

Table 129 - Off-trade Sales of Sports Drinks: Volume 2020-2025

Table 130 - Off-trade Sales of Sports Drinks: Value 2020-2025

Table 131 - Off-trade Sales of Sports Drinks: % Volume Growth 2020-2025

Table 132 - Off-trade Sales of Sports Drinks: % Value Growth 2020-2025

Table 133 - NBO Company Shares of Off-trade Sports Drinks: % Volume 2021-2025

Table 134 - LBN Brand Shares of Off-trade Sports Drinks: % Volume 2022-2025

Table 135 - NBO Company Shares of Off-trade Sports Drinks: % Value 2021-2025

Table 136 - LBN Brand Shares of Off-trade Sports Drinks: % Value 2022-2025

Table 137 - Forecast Off-trade Sales of Sports Drinks: Volume 2025-2030

Table 138 - Forecast Off-trade Sales of Sports Drinks: Value 2025-2030

Table 139 - Forecast Off-trade Sales of Sports Drinks: % Volume Growth 2025-2030

Table 140 - Forecast Off-trade Sales of Sports Drinks: % Value Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

About Euromonitor International

Euromonitor International is an independent market intelligence provider. Data, insight and analysis stem from in-the-field research spanning 210 national markets.

Content ranges from the in-depth and country-specific, to key strategic themes with a global range and significance. Products cover a comprehensive range of insights and market data, but can be broadly categorised as:

- **Strategy Briefings:** Global or regional in scope, and focussing on the most important themes shaping consumer demand, the key markets, competitive environment and future outlook across a range of industries.
- **Company Profiles:** Analysis dedicated to the world's most significant companies, with detailed insight into their activities, focus of operations, their competitors, their geographic presence and performance.
- **Country Reports:** For an in-depth understanding of specific countries, whether by industry, economic metrics or consumer trends and lifestyles. These reports cover current trends, consumer demand, market potential and future prospects, with country-specific local insight and comprehensive data, unavailable elsewhere.

For more information on this report, further enquiries can be directed via this link www.euromonitor.com/soft-drinks-in-pakistan/report.