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Soft Drinks in Uzbekistan

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EXECUTIVE SUMMARY

Healthy sales overall for soft drinks, as the category rebounds

KEY DATA FINDINGS

INDUSTRY PERFORMANCE

Flavour and packaging innovations are key growth drivers in soft drinks

RTD tea benefits from new flavour launches, with Coca-Cola's Fuse Tea leading the way

The rise of other non-cola carbonates is supported by new flavour innovations

WHAT'S NEXT?

Ongoing positive sales for soft drinks, supported by economic stabilisation and shifting lifestyle trends

Company activity and product innovation will remain central to the performance of soft drinks

Reduced-sugar variants and underdeveloped categories expected to remain niche

COMPETITIVE LANDSCAPE

Coca-Cola maintains leading place thanks to strong brand portfolio and frequent innovations

Lomisi benefits from increased imports of Natakhtari, while Coca-Cola sees a rebound in growth

Acqua Life Bottlers active in new flavour developments in carbonates

CHANNELS

Small local grocers continue to play a crucial role to sales

Convenience stores and e-commerce show strong growth from low bases

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[Bottled Water in Uzbekistan](#)

KEY DATA FINDINGS

2025 DEVELOPMENTS

Ongoing healthy growth for bottled water thanks to strong demand

INDUSTRY PERFORMANCE

Bottled water meets a wide range of consumer needs, from bulk formats to on-the-go consumption

Flavoured bottled water remains dynamic in growth and developments

WHAT'S NEXT?

Consumer reliance on bottled water will continue to underpin demand

Innovation will remain a key growth driver in bottled water, from formats to functional variants

Bulk water expected to continue posting steady growth, while water vending machines grow from a low base

COMPETITIVE LANDSCAPE

Hydrolife maintains strong lead in bottled water, thanks to strong portfolio of different options and formats

Chortoq benefits from format innovations and distribution through both off-trade and on-trade channels

CHANNELS

Small local grocers maintains largest channel lead, despite competition from the ongoing expansion of large retailers

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[Carbonates in Uzbekistan](#)

KEY DATA FINDINGS

2025 DEVELOPMENTS

Volume sales of carbonates rebound to healthy growth

INDUSTRY PERFORMANCE

Consumers adjust to the higher price environment and demand returns

Demand for flavour diversification boosts demand for other non-cola carbonates

WHAT'S NEXT?

Positive sales supported by a strong consumer audience and ongoing innovations

Social media will continue to be a key consumer engagement channel

New tax regulations set to impact high-sugar soft drinks

COMPETITIVE LANDSCAPE

Coca-Cola benefits from strong brand activity and infrastructure investments

Lomisi benefits from increased imports of Natakhtari, while Coca-Cola sees a rebound in growth

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Small local grocers maintains largest channel lead, despite competition from the ongoing expansion of large retailers

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[Juice in Uzbekistan](#)

KEY DATA FINDINGS

2025 DEVELOPMENTS

Juice enjoys positive sales, despite being a somewhat seasonal product

INDUSTRY PERFORMANCE

Juice continues to compete with freshly-squeezed options made at home

Juice drinks benefit from affordable pricing and a wide flavour variety

WHAT'S NEXT?

Modest growth expected for juice, driven by affordable juice drinks
Flavour developments will remain a key driver of growth — particularly in juice drinks
New tax regulations set to impact juice with a high sugar content

COMPETITIVE LANDSCAPE

Marwin Brands maintains its leading place over close competitor Ricomel Beverages
Ricomel gains on Marwin thanks to expanding its Dinay brand

CHANNELS

Small local grocers maintains largest channel lead, despite competition from the ongoing expansion of large retailers
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[RTD Tea in Uzbekistan](#)

KEY DATA FINDINGS

2025 DEVELOPMENTS

RTD tea sees the strongest volume sales in soft drinks

INDUSTRY PERFORMANCE

Performance of RTD tea underpinned by traditional tea-drinking culture in the country
Still RTD tea remains the only significant option

WHAT'S NEXT?

RTD tea will maintain healthy sales, driven by strong local demand
Ongoing innovations in flavours and formats expected
New tax regulations set to impact high-sugar RTD tea products

COMPETITIVE LANDSCAPE

Coca-Cola maintains its lead with the popular Fuse Tea brand
Galanz Bottlers sees strongest growth as an emergent company, while Coca-Cola steams ahead

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Small local grocers maintains largest channel lead, despite competition from the ongoing expansion of large retailers
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Energy Drinks in Uzbekistan

KEY DATA FINDINGS

2025 DEVELOPMENTS

Demand for energy drinks rebounds in 2025, following a previous slump

INDUSTRY PERFORMANCE

Healthy growth in energy drinks supported by demand for new flavour profiles and convenient formats

Reduced-sugar energy drinks continue to grow, although still remain niche compared to regular variants

WHAT'S NEXT?

Energy drinks will maintain a positive momentum, with a return to double-digit volume growth

Innovation in flavours will continue to pique consumers' interest

Social media will remain an important platform for consumer engagement

COMPETITIVE LANDSCAPE

Flash Up maintains a strong lead with flavour innovations and active consumer engagement

Emergent Lavina brand enjoys robust growth

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Small local grocers maintains largest channel lead, despite competition from the ongoing expansion of large retailers

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