



Euromonitor
International

Concentrates in Kazakhstan

December 2025

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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

CHANNELS

Differing distribution for liquid and powder concentrates
Convenience stores and e-commerce register healthy volume growth
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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
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