



Euromonitor
International

Soft Drinks in Iraq

March 2026

Table of Contents

EXECUTIVE SUMMARY

Soft drinks consumption rises as heat and bottled water reliance lift demand

KEY DATA FINDINGS

INDUSTRY PERFORMANCE

Strong growth seen in 2025

Price sensitivity high as supply expands and offers converge

Bottled water reliance intensifies as infrastructure constraints deepen

Category demand varies by occasion, seasonality and lifestyle

New launches struggle outside RTD as consumer preferences stay pragmatic

Health and sustainability awareness rises, but behaviour shifts remain gradual

Local production expands under policy support, despite regulation and distribution frictions

WHAT'S NEXT?

Volume growth to stay strong as bottled water keeps essential role

Local production expansion amid both consolidation and fragmentation

Differentiation and health-led shifts to become more influential

COMPETITIVE LANDSCAPE

UB Holding leads through bottled water scale while Nestlé gains momentum in RTD

Price-led competition persists amid broad availability and operational complexity

CHANNELS

Small local grocers remain dominant channel alongside informal trade

On trade holds substantial share of sales as cafés expand

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

Table 14 - LBN Brand Shares of Off-trade Soft Drinks (RTD): % Volume 2022-2025

Table 15 - NBO Company Shares of Off-trade Soft Drinks: % Value 2021-2025

Table 16 - LBN Brand Shares of Off-trade Soft Drinks: % Value 2022-2025

Table 17 - Penetration of Private Label in Off-trade Soft Drinks (RTD) by Category: % Volume 2020-2025

Table 18 - Penetration of Private Label in Off-trade Soft Drinks by Category: % Value 2020-2025

Table 19 - Distribution of Off-trade Soft Drinks (as sold) by Format: % Volume 2020-2025

Table 20 - Distribution of Off-trade Soft Drinks (as sold) by Format and Category: % Volume 2025

Table 21 - Forecast Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: Volume 2025-2030

Table 22 - Forecast Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: % Volume Growth 2025-2030

Table 23 - Forecast Off-trade vs On-trade Sales of Soft Drinks by Channel: Value 2025-2030

Table 24 - Forecast Off-trade vs On-trade Sales of Soft Drinks by Channel: % Value Growth 2025-2030

Table 25 - Forecast Off-trade Sales of Soft Drinks (RTD) by Category: Volume 2025-2030

Table 26 - Forecast Off-trade Sales of Soft Drinks (RTD) by Category: % Volume Growth 2025-2030

Table 27 - Forecast Off-trade Sales of Soft Drinks by Category: Value 2025-2030

Table 28 - Forecast Off-trade Sales of Soft Drinks by Category: % Value Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

CARBONATES

Key data findings

2025 Developments

Carbonates sees robust growth amid high heat and low prices

Industry performance

Iraq's carbonates volume sales rise strongly in 2025

Pricing pressure eases, but high costs reshape competition

Health awareness rises slowly, benefiting reduced-sugar options

What's next?

Demand growth will persist as urban living drives frequency

Reduced-sugar variants to gain ground thanks to stronger health influence

Retail execution becomes decisive while costs rise and premiums emerge

Competitive landscape

Pepsi and Coca-Cola lead through production scale and distribution reach

Smaller brands gain listings on retailer margins and value positioning

Channels

Small local grocers anchor distribution while modern grocery expands

Modern grocery accelerates as retail infrastructure investment scales up

Category Data

Table 29 - Off-trade vs On-trade Sales of Carbonates: Volume 2020-2025

Table 30 - Off-trade vs On-trade Sales of Carbonates: Value 2020-2025

Table 31 - Off-trade vs On-trade Sales of Carbonates: % Volume Growth 2020-2025

Table 32 - Off-trade vs On-trade Sales of Carbonates: % Value Growth 2020-2025

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

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

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

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

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

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

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

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

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

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

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

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

JUICE

Key data findings

Local supply constraints limit category potential

Industry performance

Volume sales rise demand expands from low base

Juice drinks gains traction thanks to domestic players' focus on value formats

Fresh juice culture shapes packaged demand and skews premiumisation

Health positioning supports demand, but sugar content limits credibility of juice drinks

What's next?

Volume growth to continue amid persistent structural constraints

Shift towards higher fruit content and lower sugar propositions

Full potential stays out of reach without investment and stronger capabilities

Competitive landscape

Karwanchi leads as local production supports price and availability

Local brand dominance limits innovation and keeps distribution regional

Channels

Small local grocers leads distribution as price competition supports high throughput

Modern grocery benefits from urban bulk buying

Category Data

Table 45 - Off-trade Sales of Juice by Category: Volume 2020-2025

Table 46 - Off-trade Sales of Juice by Category: Value 2020-2025

Table 47 - Off-trade Sales of Juice by Category: % Volume Growth 2020-2025

Table 48 - Off-trade Sales of Juice by Category: % Value Growth 2020-2025

Table 49 - NBO Company Shares of Off-trade Juice: % Volume 2021-2025

Table 50 - LBN Brand Shares of Off-trade Juice: % Volume 2022-2025

Table 51 - NBO Company Shares of Off-trade Juice: % Value 2021-2025

Table 52 - LBN Brand Shares of Off-trade Juice: % Value 2022-2025

Table 53 - Forecast Off-trade Sales of Juice by Category: Volume 2025-2030

Table 54 - Forecast Off-trade Sales of Juice by Category: Value 2025-2030

Table 55 - Forecast Off-trade Sales of Juice by Category: % Volume Growth 2025-2030

Table 56 - Forecast Off-trade Sales of Juice by Category: % Value Growth 2025-2030

BOTTLED WATER

Key data findings

2025 developments

Bottled water demand rises as tap water quality deteriorates

Industry performance

Volume sales increase amid persistently weak infrastructure

Tap water quality issues keep bottled water essential

Prices stay low as domestic production scales up

What's next?

Demand growth continues as bottled water stays the default option

Local supply dominates as fragmentation persists across regions

Sustainability and quality concerns gain visibility, but packaging shifts stay gradual

Competitive landscape

UB Holding leads as scale and distribution secure availability

Local brands dominate while promotion focuses on trade incentives

Channels

Small local grocers leads distribution through convenience and bulk handling

Modern grocery expands faster as bulk promotions attract shoppers

Category Data

Table 57 - Off-trade Sales of Bottled Water by Category: Volume 2020-2025

Table 58 - Off-trade Sales of Bottled Water by Category: Value 2020-2025

Table 59 - Off-trade Sales of Bottled Water by Category: % Volume Growth 2020-2025

Table 60 - Off-trade Sales of Bottled Water by Category: % Value Growth 2020-2025

Table 61 - NBO Company Shares of Off-trade Bottled Water: % Volume 2021-2025

Table 62 - LBN Brand Shares of Off-trade Bottled Water: % Volume 2022-2025

Table 63 - NBO Company Shares of Off-trade Bottled Water: % Value 2021-2025

Table 64 - LBN Brand Shares of Off-trade Bottled Water: % Value 2022-2025

Table 65 - Forecast Off-trade Sales of Bottled Water by Category: Volume 2025-2030

Table 66 - Forecast Off-trade Sales of Bottled Water by Category: Value 2025-2030

Table 67 - Forecast Off-trade Sales of Bottled Water by Category: % Volume Growth 2025-2030

Table 68 - Forecast Off-trade Sales of Bottled Water by Category: % Value Growth 2025-2030

SPORTS DRINKS

Key data findings

2025 Developments

Sports drinks demand stays niche as high prices limit broader uptake

INDUSTRY PERFORMANCE

2025 growth continues, but affordability keeps sports drinks non-essential

Consumption remains confined to small, high-income audience

What's next?

Growth will continue, but high prices keep the category niche

Competitive landscape

Powerade sets the competitive benchmark

Channels

Small local grocers leads distribution in 2025

Category Data

Table 69 - Off-trade Sales of Sports Drinks: Volume 2020-2025

Table 70 - Off-trade Sales of Sports Drinks: Value 2020-2025

Table 71 - Off-trade Sales of Sports Drinks: % Volume Growth 2020-2025

Table 72 - Off-trade Sales of Sports Drinks: % Value Growth 2020-2025

Table 73 - NBO Company Shares of Off-trade Sports Drinks: % Volume 2021-2025

Table 74 - LBN Brand Shares of Off-trade Sports Drinks: % Volume 2022-2025

Table 75 - NBO Company Shares of Off-trade Sports Drinks: % Value 2021-2025

Table 76 - LBN Brand Shares of Off-trade Sports Drinks: % Value 2022-2025

Table 77 - Forecast Off-trade Sales of Sports Drinks: Volume 2025-2030

Table 78 - Forecast Off-trade Sales of Sports Drinks: Value 2025-2030

Table 79 - Forecast Off-trade Sales of Sports Drinks: % Volume Growth 2025-2030

Table 80 - Forecast Off-trade Sales of Sports Drinks: % Value Growth 2025-2030

ENERGY DRINKS

Key data findings

2025 Developments

Energy drinks consumption expands as low prices widen everyday use

Industry performance

Volume sales rise strongly in 2025 thanks to broader daily use

Price sensitivity keeps distribution and affordability at the centre of competition

Health concerns and illicit trade create uncertainty, but do not curb demand materially

What's next?

Volume sales to see further though slowed growth

Pricing and distribution will keep defining success as local production expands

Brands to polarise with health perceptions and product integrity shaping outlook

Competitive landscape

Karwanchi leads as local players gain share through price and availability

Frequent launches continue, but smaller brands struggle to build durability

Channels

Small local grocers anchors energy drinks distribution

Category Data

Table 81 - Off-trade Sales of Energy Drinks: Volume 2020-2025

Table 82 - Off-trade Sales of Energy Drinks: Value 2020-2025

Table 83 - Off-trade Sales of Energy Drinks: % Volume Growth 2020-2025

Table 84 - Off-trade Sales of Energy Drinks: % Value Growth 2020-2025

Table 85 - NBO Company Shares of Off-trade Energy Drinks: % Volume 2021-2025

Table 86 - LBN Brand Shares of Off-trade Energy Drinks: % Volume 2022-2025

Table 87 - NBO Company Shares of Off-trade Energy Drinks: % Value 2021-2025

Table 88 - LBN Brand Shares of Off-trade Energy Drinks: % Value 2022-2025

Table 89 - Forecast Off-trade Sales of Energy Drinks: Volume 2025-2030

Table 90 - Forecast Off-trade Sales of Energy Drinks: Value 2025-2030

Table 91 - Forecast Off-trade Sales of Energy Drinks: % Volume Growth 2025-2030

Table 92 - Forecast Off-trade Sales of Energy Drinks: % Value Growth 2025-2030

CONCENTRATES

Key data findings

2025 developments

Growth still sluggish as value positioning supports a niche role

Industry performance

Volume sales rises modestly in 2025

Value positioning supports use in families and seasonal gatherings

Inflation, new flavours and limited differentiation shape 2025 performance

What's next?

Modest growth to continue, with performance sensitive to household budgets

Health-led shifts curb upside as fresh alternatives strengthen

Limited investment among persistent fragmentation

Competitive landscape

Al Nadir leads overall concentrates in 2025

Nichols gains momentum as powder brands hold value-focused roles

Channels

Small local grocers anchors concentrates distribution

Wider listing supports growth as modern grocery strengthens

Category Data

Summary 1 - Concentrates Conversion Factors for Ready-to-Drink (RTD) Format

Table 93 - Off-trade Sales of Concentrates (RTD) by Category: Volume 2020-2025

Table 94 - Off-trade Sales of Concentrates by Category: Value 2020-2025

Table 95 - Off-trade Sales of Concentrates (RTD) by Category: % Volume Growth 2020-2025

Table 96 - Off-trade Sales of Concentrates by Category: % Value Growth 2020-2025

Table 97 - NBO Company Shares of Off-trade Concentrates (RTD): % Volume 2021-2025

Table 98 - LBN Brand Shares of Off-trade Concentrates (RTD): % Volume 2022-2025

Table 99 - NBO Company Shares of Off-trade Concentrates: % Volume 2021-2025

Table 100 - LBN Brand Shares of Off-trade Concentrates: % Volume 2022-2025

Table 101 - NBO Company Shares of Off-trade Concentrates: % Value 2021-2025

Table 102 - LBN Brand Shares of Off-trade Concentrates: % Value 2022-2025

Table 103 - NBO Company Shares of Off-trade Liquid Concentrates (RTD): % Volume 2021-2025

Table 104 - LBN Brand Shares of Off-trade Liquid Concentrates (RTD): % Volume 2022-2025

Table 105 - NBO Company Shares of Off-trade Liquid Concentrates: % Volume 2021-2025

Table 106 - LBN Brand Shares of Off-trade Liquid Concentrates: % Volume 2022-2025

Table 107 - NBO Company Shares of Off-trade Powder Concentrates (RTD): % Volume 2021-2025

Table 108 - LBN Brand Shares of Off-trade Powder Concentrates (RTD): % Volume 2022-2025

Table 109 - NBO Company Shares of Off-trade Powder Concentrates: % Volume 2021-2025

Table 110 - LBN Brand Shares of Off-trade Powder Concentrates: % Volume 2022-2025

Table 111 - Forecast Off-trade Sales of Concentrates (RTD) by Category: Volume 2025-2030

Table 112 - Forecast Off-trade Sales of Concentrates by Category: Value 2025-2030

Table 113 - Forecast Off-trade Sales of Concentrates (RTD) by Category: % Volume Growth 2025-2030

Table 114 - Forecast Off-trade Sales of Concentrates by Category: % Value Growth 2025-2030

RTD TEA

Key data findings

2025 developments

RTD tea expands from low base as availability widens in cities

Industry performance

RTD tea volumes, but category stays niche

Price pressure and limited familiarity hold back wider uptake

On-trade relevance stays limited and product formats remain narrow

What's next?

Volume sales set to rise as hot weather and urbanisation widen exposure

Pricing, local production and fragmentation shape the competitive path

Marketing and taste adaptation become essential for broader adoption

Competitive landscape

Unilever leads through Lipton's distribution advantage

Pergama gains momentum as newer challenger

Channels

Small local grocers expands listings and becomes the main sales engine

Modern grocery retains relevance as refrigeration and parallel flows shape availability

Category Data

Table 115 - Off-trade Sales of RTD Tea by Category: Volume 2020-2025

Table 116 - Off-trade Sales of RTD Tea by Category: Value 2020-2025

Table 117 - Off-trade Sales of RTD Tea by Category: % Volume Growth 2020-2025

Table 118 - Off-trade Sales of RTD Tea by Category: % Value Growth 2020-2025

Table 119 - NBO Company Shares of Off-trade RTD Tea: % Volume 2021-2025

Table 120 - LBN Brand Shares of Off-trade RTD Tea: % Volume 2022-2025

Table 121 - NBO Company Shares of Off-trade RTD Tea: % Value 2021-2025

Table 122 - LBN Brand Shares of Off-trade RTD Tea: % Value 2022-2025

Table 123 - Forecast Off-trade Sales of RTD Tea by Category: Volume 2025-2030

Table 124 - Forecast Off-trade Sales of RTD Tea by Category: Value 2025-2030

Table 125 - Forecast Off-trade Sales of RTD Tea by Category: % Volume Growth 2025-2030

Table 126 - Forecast Off-trade Sales of RTD Tea by Category: % Value Growth 2025-2030

RTD COFFEE

Key data findings

2025 Developments

RTD coffee accelerates as younger consumers drive trial despite high prices

Industry performance

Volume growth surges as RTD coffee becomes more visible in urban routines

High inflation and low essentiality keep category narrow

Availability and refrigeration needs constrain distribution reach

What's next?

Volume growth to moderate as price remains main limiter

Health-led positioning supports expansion and pushes lower-sugar options

Development to continue, but limited investment curbs full potential

Competitive landscape

Ennstal Milch leads while Nestlé drives momentum through Nescafé

Brand choice stays narrow as inflation pressures smaller importers

Channels

Small local grocers leads distribution while forecourt retailers grows fastest

Distribution stays concentrated, with local production offering a route to wider access

Category Data

Table 127 - Off-trade Sales of RTD Coffee: Volume 2020-2025

Table 128 - Off-trade Sales of RTD Coffee: Value 2020-2025

Table 129 - Off-trade Sales of RTD Coffee: % Volume Growth 2020-2025

Table 130 - Off-trade Sales of RTD Coffee: % Value Growth 2020-2025

Table 131 - NBO Company Shares of Off-trade RTD Coffee: % Volume 2021-2025

Table 132 - LBN Brand Shares of Off-trade RTD Coffee: % Volume 2022-2025

Table 133 - NBO Company Shares of Off-trade RTD Coffee: % Value 2021-2025

Table 134 - LBN Brand Shares of Off-trade RTD Coffee: % Value 2022-2025

Table 135 - Forecast Off-trade Sales of RTD Coffee: Volume 2025-2030

Table 136 - Forecast Off-trade Sales of RTD Coffee: Value 2025-2030

Table 137 - Forecast Off-trade Sales of RTD Coffee: % Volume Growth 2025-2030

Table 138 - Forecast Off-trade Sales of RTD Coffee: % Value Growth 2025-2030

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