



RTD Tea in Ukraine

December 2025

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RTD Tea in Ukraine - Category analysis

KEY DATA FINDINGS

2025 DEVELOPMENTS

Ongoing recovery is boosted by niche lines

INDUSTRY PERFORMANCE

Still RTD tea is the dominant choice

Kombucha develops well as a niche category

WHAT'S NEXT?

Shifting consumer preferences will challenge regular lines as functional lines gain traction

Numerous craft kombucha novelties emerge

Functional RTD tea is launched by craft beer brewery Underwood

COMPETITIVE LANDSCAPE

Fuze Tea retains its leading position even as volume share is eroded

Eat Easy TOV enjoys dynamism with its kombucha line

CHANNELS

Supermarkets lead with private label holding significant share

Vending sales begin to pick up

CATEGORY DATA

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Soft Drinks in Ukraine - Industry Overview

EXECUTIVE SUMMARY

Soft drinks continues to show recovery

KEY DATA FINDINGS

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

CHANNELS

Supermarkets are primary channel for soft drinks
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