



RTD Coffee in Kazakhstan

December 2025

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RTD Coffee in Kazakhstan - Category analysis

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RTD coffee still an emerging product

INDUSTRY PERFORMANCE

Healthy volume growth in 2025

Volume sales continue to be low

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Lower growth over forecast

RTD coffee ripe for innovation

Younger consumers drive volume growth

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Two top players continue to dominate

Little space for more premium players

CHANNELS

Small local grocers lead retail distribution, but are losing volume share

Minimal volume sales through foodservice

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Soft Drinks in Kazakhstan - Industry Overview

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2025 marks a recovery, as inflation eases

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INDUSTRY PERFORMANCE

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
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Summary 1 - Research Sources

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