



# Soft Drinks in Pakistan

December 2025

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## EXECUTIVE SUMMARY

Urbanisation and channel expansion fuel consumption

## KEY DATA FINDINGS

## INDUSTRY PERFORMANCE

Favourable economic conditions and demographics boost demand for soft drinks

Health and wellness trends shape consumption habits

Retail expansion improves product accessibility

## WHAT'S NEXT?

Stabilising economy will boost demand

Expected shift towards healthier offerings

Expansion of modern retail will increase access to packaged soft drinks

## COMPETITIVE LANDSCAPE

Multinational giants hold sway

Mehran Bottlers is most dynamic player

## CHANNELS

Small local grocers lead sales

E-commerce and modern grocery outlets enhance product availability

Foodservice vs retail split

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[Bottled Water in Pakistan](#)

## KEY DATA FINDINGS

### 2025 DEVELOPMENTS

Health, convenience and innovation drive demand

## INDUSTRY PERFORMANCE

Still purified bottled water dominates sales

Rise of restaurant-branded offerings

## WHAT'S NEXT?

Bottled water offers scope for further diversification

Technological advancements will lead to greater consistency

Sustainability will become key manufacturer and customer focus

## COMPETITIVE LANDSCAPE

Nestlé maintains dominance

Mehran Bottlers leverages existing consumer trust and distribution network

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[Carbonates in Pakistan](#)

## KEY DATA FINDINGS

### 2025 DEVELOPMENTS

Carbonates stabilises as brands rebuild momentum

## INDUSTRY PERFORMANCE

Demand stabilises as boycotts ease

Lemonade/lime leads growth

## WHAT'S NEXT?

Product innovation will be key growth driver

Customer engagement will be key focus

Sustainability will be central to brand strategies

## COMPETITIVE LANDSCAPE

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Mehran Bottlers leads growth

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[Concentrates in Pakistan](#)

## KEY DATA FINDINGS

### 2025 DEVELOPMENTS

Affordability drives growth

## INDUSTRY PERFORMANCE

Ongoing consumer price consciousness sustains demand

Powder concentrates leads growth

## WHAT'S NEXT?

Concentrates poised for further growth, driven by convenience and accessibility  
Health trends will spark wellness-driven innovation  
Potential lies with foodservice operators

## COMPETITIVE LANDSCAPE

Local brands lead liquid concentrates  
Mondelez dominates powder variants

## CHANNELS

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[Juice in Pakistan](#)

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### 2025 DEVELOPMENTS

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## INDUSTRY PERFORMANCE

Greater economic stability boost sales  
Not from concentrate 100% juice makes full recovery

## WHAT'S NEXT?

Positive outlook for juice  
Health and wellness trend will impact consumer preferences  
Foodservice channel will be key growth driver

## COMPETITIVE LANDSCAPE

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## INDUSTRY PERFORMANCE

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Young urban adults drive demand

## WHAT'S NEXT?

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Manufacturing advancements will lead to wider availability  
Potential for health and wellness-oriented offerings

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#### INDUSTRY PERFORMANCE

RTD tea sees solid growth from low base

Reduced sugar variants remain underdeveloped

#### WHAT'S NEXT?

Retail modernisation and growing demand for convenience will boost sales

Premiumisation offers untapped opportunities

Sustainable packaging could become key differentiator

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### Energy Drinks in Pakistan

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#### INDUSTRY PERFORMANCE

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Reduced sugar variants remain limited

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Young Pakistanis will continue as core consumer base  
Digitalisation to unlock significant growth opportunities  
Health and wellness trends will prompt players to reposition their offerings

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## INDUSTRY PERFORMANCE

Growing popularity of padel tennis boosts sales  
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Rising fitness culture will support increase in sales  
Shift towards functional positioning  
Convenient distribution channels will be key to expansion of sports drinks

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