



Carbonates in Georgia

December 2025

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KEY DATA FINDINGS

2025 DEVELOPMENTS

Carbonates remain highly popular with Georgian consumers

INDUSTRY PERFORMANCE

Continuation of positive growth trajectory
Reduced sugar lemonade/lime leads growth

WHAT'S NEXT?

International brands will drive continued growth
Local brands will turn to premiumisation amid fierce competition
Health and wellness trend will gain traction

COMPETITIVE LANDSCAPE

Coca-Cola holds leading position
Cola-Cola drives sales through marketing investment and chiller cabinet expansion

CHANNELS

Convenience stores remains primary channel
Convenience stores and e-commerce register rapid growth

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EXECUTIVE SUMMARY

Convenience, affordability, and health drive sales

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INDUSTRY PERFORMANCE

Continued growth for soft drinks

Gradual shift towards healthier choices

Consumers prioritise affordability amid mounting cost-of-living pressures

WHAT'S NEXT

Forecast steady growth despite price increases

Convenience will be key innovation driver

Further expansion of modern grocery retail will increase competitive pressures

COMPETITIVE LANDSCAPE

Coca-Cola strengthens leadership through marketing and chiller cabinet expansion

Caffeine-focused brands see strong performance

Growing presence of parallel imports

CHANNELS

Convenience stores remains leading distribution channel

E-commerce registers rapid growth

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