

Carbonates in Pakistan

January 2024

Table of Contents

KEY DATA FINDINGS

2023 DEVELOPMENTS

Flavours key competitive tool in 2023

Coca-Cola and PepsiCo benefit from extensive distribution

Brands engaging in increased marketing spends

PROSPECTS AND OPPORTUNITIES

Moderate volume growth over forecast period

Coca-Cola and PepsiCo also look to increase e-commerce sales

Other soft drinks pose increasing threat

CATEGORY DATA

Table 1 - Off-trade vs On-trade Sales of Carbonates: Volume 2018-2023

Table 2 - Off-trade vs On-trade Sales of Carbonates: Value 2018-2023

Table 3 - Off-trade vs On-trade Sales of Carbonates: % Volume Growth 2018-2023

Table 4 - Off-trade vs On-trade Sales of Carbonates: % Value Growth 2018-2023

Table 5 - Off-trade Sales of Carbonates by Category: Volume 2018-2023

Table 6 - Off-trade Sales of Carbonates by Category: Value 2018-2023

Table 7 - Off-trade Sales of Carbonates by Category: % Volume Growth 2018-2023

Table 8 - Off-trade Sales of Carbonates by Category: % Value Growth 2018-2023

Table 9 - Sales of Carbonates by Total Fountain On-trade: Volume 2018-2023

Table 10 - Sales of Carbonates by Total Fountain On-trade: % Volume Growth 2018-2023

Table 11 - NBO Company Shares of Off-trade Carbonates: % Volume 2019-2023

Table 12 - LBN Brand Shares of Off-trade Carbonates: % Volume 2020-2023

Table 13 - NBO Company Shares of Off-trade Carbonates: % Value 2019-2023

Table 14 - LBN Brand Shares of Off-trade Carbonates: % Value 2020-2023

Table 15 - Forecast Off-trade Sales of Carbonates by Category: Volume 2023-2028

Table 16 - Forecast Off-trade Sales of Carbonates by Category: Value 2023-2028

Table 17 - Forecast Off-trade Sales of Carbonates by Category: % Volume Growth 2023-2028

Table 18 - Forecast Off-trade Sales of Carbonates by Category: % Value Growth 2023-2028

Table 19 - Forecast Sales of Carbonates by Total Fountain On-trade: Volume 2023-2028

Table 20 - Forecast Sales of Carbonates by Total Fountain On-trade: % Volume Growth 2023-2028

Soft Drinks in Pakistan - Industry Overview

EXECUTIVE SUMMARY

Soft drinks in 2023: The big picture

2023 key trends

Competitive landscape

Retailing developments

Foodservice vs retail split

What next for soft drinks?

MARKET DATA

Table 21 - Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: Volume 2018-2023

Table 22 - Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: % Volume Growth 2018-2023

Table 23 - Off-trade vs On-trade Sales of Soft Drinks by Channel: Value 2018-2023

Table 24 - Off-trade vs On-trade Sales of Soft Drinks by Channel: % Value Growth 2018-2023

Table 25 - Off-trade vs On-trade Sales of Soft Drinks (as sold) by Category: Volume 2022

Table 26 - Off-trade vs On-trade Sales of Soft Drinks (as sold) by Category: % Volume 2022

Table 27 - Off-trade vs On-trade Sales of Soft Drinks by Category: Value 2022

Table 28 - Off-trade vs On-trade Sales of Soft Drinks by Category: % Value 2022

Table 29 - Off-trade Sales of Soft Drinks (RTD) by Category: Volume 2018-2023

Table 30 - Off-trade Sales of Soft Drinks (RTD) by Category: % Volume Growth 2018-2023

Table 31 - Off-trade Sales of Soft Drinks by Category: Value 2018-2023

Table 32 - Off-trade Sales of Soft Drinks by Category: % Value Growth 2018-2023

Table 33 - Sales of Soft Drinks by Total Fountain On-trade: Volume 2018-2023

Table 34 - Sales of Soft Drinks by Total Fountain On-trade: % Volume Growth 2018-2023

Table 35 - NBO Company Shares of Off-trade Soft Drinks (RTD): % Volume 2019-2023

Table 36 - LBN Brand Shares of Off-trade Soft Drinks (RTD): % Volume 2020-2023

Table 37 - NBO Company Shares of Off-trade Soft Drinks: % Value 2019-2023

Table 38 - LBN Brand Shares of Off-trade Soft Drinks: % Value 2020-2023

Table 39 - Distribution of Off-trade Soft Drinks (as sold) by Format: % Volume 2018-2023

Table 40 - Distribution of Off-trade Soft Drinks (as sold) by Format and Category: % Volume 2023

Table 41 - Forecast Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: Volume 2023-2028

Table 42 - Forecast Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: % Volume Growth 2023-2028

Table 43 - Forecast Off-trade vs On-trade Sales of Soft Drinks by Channel: Value 2023-2028

Table 44 - Forecast Off-trade vs On-trade Sales of Soft Drinks by Channel: % Value Growth 2023-2028

Table 45 - Forecast Off-trade Sales of Soft Drinks (RTD) by Category: Volume 2023-2028

Table 46 - Forecast Off-trade Sales of Soft Drinks (RTD) by Category: % Volume Growth 2023-2028

Table 47 - Forecast Off-trade Sales of Soft Drinks by Category: Value 2023-2028

Table 48 - Forecast Off-trade Sales of Soft Drinks by Category: % Value Growth 2023-2028

Table 49 - Forecast Sales of Soft Drinks by Total Fountain On-trade: Volume 2023-2028

Table 50 - Forecast Sales of Soft Drinks by Total Fountain On-trade: % Volume Growth 2023-2028

DISCLAIMER

SOURCES

Summary 1 - Research Sources

About Euromonitor International

Euromonitor International is an independent market intelligence provider. Data, insight and analysis stem from in-the-field research spanning 210 national markets.

Content ranges from the in-depth and country-specific, to key strategic themes with a global range and significance. Products cover a comprehensive range of insights and market data, but can be broadly categorised as:

- **Strategy Briefings:** Global or regional in scope, and focussing on the most important themes shaping consumer demand, the key markets, competitive environment and future outlook across a range of industries.
- **Company Profiles:** Analysis dedicated to the world's most significant companies, with detailed insight into their activities, focus of operations, their competitors, their geographic presence and performance.
- **Country Reports:** For an in-depth understanding of specific countries, whether by industry, economic metrics or consumer trends and lifestyles. These reports cover current trends, consumer demand, market potential and future prospects, with country-specific local insight and comprehensive data, unavailable elsewhere.

For more information on this report, further enquiries can be directed via this link www.euromonitor.com/carbonates-in-pakistan/report.