

Soft Drinks in Uzbekistan

January 2024

Table of Contents

Soft Drinks in Uzbekistan

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

Table 2 - Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: % Volume Growth 2018-2023

Table 3 - Off-trade vs On-trade Sales of Soft Drinks by Channel: Value 2018-2023

Table 4 - Off-trade vs On-trade Sales of Soft Drinks by Channel: % Value Growth 2018-2023

Table 5 - Off-trade vs On-trade Sales of Soft Drinks (as sold) by Category: Volume 2023

Table 6 - Off-trade vs On-trade Sales of Soft Drinks (as sold) by Category: % Volume 2023

Table 7 - Off-trade vs On-trade Sales of Soft Drinks by Category: Value 2023

Table 8 - Off-trade vs On-trade Sales of Soft Drinks by Category: % Value 2023

Table 9 - Off-trade Sales of Soft Drinks (RTD) by Category: Volume 2018-2023

Table 10 - Off-trade Sales of Soft Drinks (RTD) by Category: % Volume Growth 2018-2023

Table 11 - Off-trade Sales of Soft Drinks by Category: Value 2018-2023

Table 12 - Off-trade Sales of Soft Drinks by Category: % Value Growth 2018-2023

Table 13 - Sales of Soft Drinks by Total Fountain On-trade: Volume 2018-2023

Table 14 - Sales of Soft Drinks by Total Fountain On-trade: % Volume Growth 2018-2023

Table 15 - NBO Company Shares of Off-trade Soft Drinks (RTD): % Volume 2019-2023

Table 16 - LBN Brand Shares of Off-trade Soft Drinks (RTD): % Volume 2020-2023

Table 17 - NBO Company Shares of Off-trade Soft Drinks: % Value 2019-2023

Table 18 - LBN Brand Shares of Off-trade Soft Drinks: % Value 2020-2023

Table 19 - Penetration of Private Label in Off-trade Soft Drinks (RTD) by Category: % Volume 2018-2023

Table 20 - Penetration of Private Label in Off-trade Soft Drinks by Category: % Value 2018-2023

Table 21 - Distribution of Off-trade Soft Drinks (as sold) by Format: % Volume 2018-2023

Table 22 - Distribution of Off-trade Soft Drinks (as sold) by Format and Category: % Volume 2023

Table 23 - Forecast Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: Volume 2023-2028

Table 24 - Forecast Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: % Volume Growth 2023-2028

Table 25 - Forecast Off-trade vs On-trade Sales of Soft Drinks by Channel: Value 2023-2028

Table 26 - Forecast Off-trade vs On-trade Sales of Soft Drinks by Channel: % Value Growth 2023-2028

Table 27 - Forecast Off-trade Sales of Soft Drinks (RTD) by Category: Volume 2023-2028

Table 28 - Forecast Off-trade Sales of Soft Drinks (RTD) by Category: % Volume Growth 2023-2028

Table 29 - Forecast Off-trade Sales of Soft Drinks by Category: Value 2023-2028

Table 30 - Forecast Off-trade Sales of Soft Drinks by Category: % Value Growth 2023-2028

Table 31 - Forecast Sales of Soft Drinks by Total Fountain On-trade: Volume 2023-2028

Table 32 - Forecast Sales of Soft Drinks by Total Fountain On-trade: % Volume Growth 2023-2028

DISCLAIMER

SOURCES

Summary 1 - Research Sources

Bottled Water in Uzbekistan

KEY DATA FINDINGS

2023 DEVELOPMENTS

Consumers substitute still bottled water for tap water
Still flavoured water emerges in Uzbekistan
Bottled water faces strong competition from carbonates and energy drinks

PROSPECTS AND OPPORTUNITIES

Population growth and health concerns over tap water to drive bottled water consumption
Bulk water holds strong growth potential
Still flavoured bottled water to witness expansion

CATEGORY DATA

Table 33 - Off-trade Sales of Bottled Water by Category: Volume 2018-2023
Table 34 - Off-trade Sales of Bottled Water by Category: Value 2018-2023
Table 35 - Off-trade Sales of Bottled Water by Category: % Volume Growth 2018-2023
Table 36 - Off-trade Sales of Bottled Water by Category: % Value Growth 2018-2023
Table 37 - NBO Company Shares of Off-trade Bottled Water: % Volume 2019-2023
Table 38 - LBN Brand Shares of Off-trade Bottled Water: % Volume 2020-2023
Table 39 - NBO Company Shares of Off-trade Bottled Water: % Value 2019-2023
Table 40 - LBN Brand Shares of Off-trade Bottled Water: % Value 2020-2023
Table 41 - Forecast Off-trade Sales of Bottled Water by Category: Volume 2023-2028
Table 42 - Forecast Off-trade Sales of Bottled Water by Category: Value 2023-2028
Table 43 - Forecast Off-trade Sales of Bottled Water by Category: % Volume Growth 2023-2028
Table 44 - Forecast Off-trade Sales of Bottled Water by Category: % Value Growth 2023-2028

Carbonates in Uzbekistan

KEY DATA FINDINGS

2023 DEVELOPMENTS

Carbonates consumption rises at a steady pace
Cola carbonates remain the firm consumer favourite
International players lead in carbonates

PROSPECTS AND OPPORTUNITIES

Demographic growth to support sales of carbonates
Traditional flavours to remain popular in carbonates
Tough competition from energy drinks, RTD tea and bottled water

CATEGORY DATA

Table 45 - Off-trade vs On-trade Sales of Carbonates: Volume 2018-2023
Table 46 - Off-trade vs On-trade Sales of Carbonates: Value 2018-2023
Table 47 - Off-trade vs On-trade Sales of Carbonates: % Volume Growth 2018-2023
Table 48 - Off-trade vs On-trade Sales of Carbonates: % Value Growth 2018-2023
Table 49 - Off-trade Sales of Carbonates by Category: Volume 2018-2023
Table 50 - Off-trade Sales of Carbonates by Category: Value 2018-2023
Table 51 - Off-trade Sales of Carbonates by Category: % Volume Growth 2018-2023
Table 52 - Off-trade Sales of Carbonates by Category: % Value Growth 2018-2023
Table 53 - Sales of Carbonates by Total Fountain On-trade: Volume 2018-2023
Table 54 - Sales of Carbonates by Total Fountain On-trade: % Volume Growth 2018-2023
Table 55 - NBO Company Shares of Off-trade Carbonates: % Volume 2019-2023
Table 56 - LBN Brand Shares of Off-trade Carbonates: % Volume 2020-2023
Table 57 - NBO Company Shares of Off-trade Carbonates: % Value 2019-2023
Table 58 - LBN Brand Shares of Off-trade Carbonates: % Value 2020-2023
Table 59 - Forecast Off-trade Sales of Carbonates by Category: Volume 2023-2028
Table 60 - Forecast Off-trade Sales of Carbonates by Category: Value 2023-2028

Table 61 - Forecast Off-trade Sales of Carbonates by Category: % Volume Growth 2023-2028

Table 62 - Forecast Off-trade Sales of Carbonates by Category: % Value Growth 2023-2028

Table 63 - Forecast Sales of Carbonates by Total Fountain On-trade: Volume 2023-2028

Table 64 - Forecast Sales of Carbonates by Total Fountain On-trade: % Volume Growth 2023-2028

Juice in Uzbekistan

KEY DATA FINDINGS

2023 DEVELOPMENTS

Falling unit prices aid volume sales growth

Nectars lose appeal as consumers prefer other options that quench thirst

Local brands shape the performance of juice category

PROSPECTS AND OPPORTUNITIES

Strong outlook for the juice category

Juice drinks anticipated as the fastest-growing category

Traditional trade to garner largest portion of juice sales

CATEGORY DATA

Table 65 - Off-trade Sales of Juice by Category: Volume 2018-2023

Table 66 - Off-trade Sales of Juice by Category: Value 2018-2023

Table 67 - Off-trade Sales of Juice by Category: % Volume Growth 2018-2023

Table 68 - Off-trade Sales of Juice by Category: % Value Growth 2018-2023

Table 69 - NBO Company Shares of Off-trade Juice: % Volume 2019-2023

Table 70 - LBN Brand Shares of Off-trade Juice: % Volume 2020-2023

Table 71 - NBO Company Shares of Off-trade Juice: % Value 2019-2023

Table 72 - LBN Brand Shares of Off-trade Juice: % Value 2020-2023

Table 73 - Forecast Off-trade Sales of Juice by Category: Volume 2023-2028

Table 74 - Forecast Off-trade Sales of Juice by Category: Value 2023-2028

Table 75 - Forecast Off-trade Sales of Juice by Category: % Volume Growth 2023-2028

Table 76 - Forecast Off-trade Sales of Juice by Category: % Value Growth 2023-2028

RTD Tea in Uzbekistan

KEY DATA FINDINGS

2023 DEVELOPMENTS

RTD tea witnesses dynamic growth

Carbonated RTD tea remains underdeveloped

Fuse tea takes the lead in RTD tea

PROSPECTS AND OPPORTUNITIES

RTD tea to experience double-digit volume growth

Tea-drinking culture will help bolster interest in RTD tea

Stagnant performance for reduced sugar options

CATEGORY DATA

Table 77 - Off-trade Sales of RTD Tea by Category: Volume 2018-2023

Table 78 - Off-trade Sales of RTD Tea by Category: Value 2018-2023

Table 79 - Off-trade Sales of RTD Tea by Category: % Volume Growth 2018-2023

Table 80 - Off-trade Sales of RTD Tea by Category: % Value Growth 2018-2023

Table 81 - NBO Company Shares of Off-trade RTD Tea: % Volume 2019-2023

Table 82 - LBN Brand Shares of Off-trade RTD Tea: % Volume 2020-2023

Table 83 - NBO Company Shares of Off-trade RTD Tea: % Value 2019-2023

Table 84 - LBN Brand Shares of Off-trade RTD Tea: % Value 2020-2023

Table 85 - Forecast Off-trade Sales of RTD Tea by Category: Volume 2023-2028

Table 86 - Forecast Off-trade Sales of RTD Tea by Category: Value 2023-2028

Table 87 - Forecast Off-trade Sales of RTD Tea by Category: % Volume Growth 2023-2028

Table 88 - Forecast Off-trade Sales of RTD Tea by Category: % Value Growth 2023-2028

Energy Drinks in Uzbekistan

KEY DATA FINDINGS

2023 DEVELOPMENTS

Dynamic growth continues in energy drinks

Flavour diversity plays a key role in driving sales

Flash Up faces strong competition from number two brand Gorilla

PROSPECTS AND OPPORTUNITIES

Energy drinks to outperform other soft drinks categories

Premium brands have limited scope for growth

Reduced sugar energy drinks to remain stagnant

CATEGORY DATA

Table 89 - Off-trade Sales of Energy Drinks: Volume 2018-2023

Table 90 - Off-trade Sales of Energy Drinks: Value 2018-2023

Table 91 - Off-trade Sales of Energy Drinks: % Volume Growth 2018-2023

Table 92 - Off-trade Sales of Energy Drinks: % Value Growth 2018-2023

Table 93 - NBO Company Shares of Off-trade Energy Drinks: % Volume 2019-2023

Table 94 - LBN Brand Shares of Off-trade Energy Drinks: % Volume 2020-2023

Table 95 - NBO Company Shares of Off-trade Energy Drinks: % Value 2019-2023

Table 96 - LBN Brand Shares of Off-trade Energy Drinks: % Value 2020-2023

Table 97 - Forecast Off-trade Sales of Energy Drinks: Volume 2023-2028

Table 98 - Forecast Off-trade Sales of Energy Drinks: Value 2023-2028

Table 99 - Forecast Off-trade Sales of Energy Drinks: % Volume Growth 2023-2028

Table 100 - Forecast Off-trade Sales of Energy Drinks: % Value Growth 2023-2028

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/soft-drinks-in-uzbekistan/report.