



RTD Tea in Estonia

December 2025

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RTD Tea in Estonia - Category analysis

KEY DATA FINDINGS

2025 DEVELOPMENTS

RTD tea faces ongoing pressures

INDUSTRY PERFORMANCE

Declining sales amid competition from more innovative RTD offerings

Reduced sugar offerings show greatest resilience

WHAT'S NEXT?

Continued decline for RTD tea

Private label could gain visibility

Forthcoming sugar tax could encourage reformulation

COMPETITIVE LANDSCAPE

Cola-Cola maintains leadership with Nestea

Private label expands from low base

CHANNELS

Supermarkets and hypermarkets lead sales

E-commerce continues to gain traction

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[Soft Drinks in Estonia - Industry Overview](#)

EXECUTIVE SUMMARY

Soft drink sales are impacted by weather, price rises, and changing consumer preferences

KEY DATA FINDINGS

INDUSTRY PERFORMANCE

Off-trade volumes decline amid cool summer and cautious consumer spending

Shift towards added-value and low-sugar beverages

Private label growth constrained by strong brand loyalty in key categories

WHAT'S NEXT?

Flat outlook as price sensitivity and category saturation limit growth

Value-added drinks will continue to gain ground among younger consumers

Weather conditions will continue to impact sales

COMPETITIVE LANDSCAPE

Coca-Cola lead sales, thanks to strong positions in carbonates and energy drinks

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