



Euromonitor
International

Concentrates in Estonia

December 2025

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Concentrates in Estonia - Category analysis

KEY DATA FINDINGS

2025 DEVELOPMENTS

Weak positioning and lack of convenience hinder sales

INDUSTRY PERFORMANCE

Persistent stagnation amid ongoing challenges

Powder concentrates show stability, while liquid offerings remain preferred choice

WHAT'S NEXT?

Gloomy outlook for concentrates

Premium liquid offerings have potential for growth

Sugar tax will bring reformulation into focus

COMPETITIVE LANDSCAPE

Orkla Eesti AS leads concentrates

Okla Eesti AS strengthens its position, thanks to deep knowledge of local tastes

CHANNELS

Supermarkets and hypermarkets lead sales

Discounters channel sees rapid growth

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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

CHANNELS

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