

Carbonates in Estonia

December 2025

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KEY DATA FINDINGS

2025 DEVELOPMENTS

Challenging times for carbonates

INDUSTRY PERFORMANCE

VAT increase and cold summer weather weigh on off-trade carbonates

Reduced sugar colas lead volume growth

WHAT'S NEXT?

Carbonates faces stagnation amid health trends and maturity

Flavour innovation will be limited as focus shifts to sugar-free variants

COMPETITIVE LANDSCAPE

Coca-Cola continues to dominate sales

Lidl drives growth through private label Freeway range

CHANNELS

Supermarkets and hypermarkets lead sales

Discounters channel drives 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

Supermarkets and hypermarkets lead sales
Lidl drives growth of discounters
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