



Carbonates in Estonia

December 2025

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Carbonates in Estonia - Category analysis

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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

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KEY DATA FINDINGS

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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

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