



Carbonates in Latvia

December 2025

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Carbonates in Latvia - Category analysis

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2025 DEVELOPMENTS

Shift towards lower-sugar offerings

INDUSTRY PERFORMANCE

Continued decline in carbonates

Reduced sugar cola carbonates show greatest resilience as health concerns accelerate

WHAT'S NEXT?

Carbonates set to stagnate as competition from other soft drinks and unfavourable demographic shifts weigh on growth

Players to scale back innovation

Excise duty increase will reshape carbonates

COMPETITIVE LANDSCAPE

Coca-Cola HBC Latvia SIA dominates carbonates

Pepsi Cola General Bottlers sees fastest growth

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Discounters shows greatest dynamism

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INDUSTRY PEFORMANCE

Cold summer temperatures impact demand
Energy drinks registers strong performance
Juice continues to struggle

WHAT'S NEXT?

Modest recovery for soft drinks
Added-value categories to drive future growth
Excise duty increase will reshape soft drinks market

COMPETITIVE LANDSCAPE

Cido Grupa and Cola-Cola dominate sales
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