

# Carbonates in Latvia

December 2025

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KEY DATA FINDINGS

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

CHANNELS

Supermarkets leads the distribution landscape  
Discounters shows greatest dynamism

CATEGORY DATA

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EXECUTIVE SUMMARY

Challenging year for soft drinks

KEY DATA FINDINGS

## INDUSTRY PERFORMANCE

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

Aldaris AS leads growth with Vichy bottled water

## CHANNELS

Supermarkets remains largest channel

Discounters gains traction

E-commerce expands from low base

Foodservice vs retail split

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## About Euromonitor International

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