



Soft Drinks in Lithuania

December 2025

Table of Contents

Soft Drinks in Lithuania

EXECUTIVE SUMMARY

Soft drinks under pressure from weather, price pressures and health trends

KEY DATA FINDINGS

INDUSTRY PERFORMANCE

Soft drinks volumes decline amid cold summer weather and creeping inflation

Shift towards low sugar options

Energy drinks drives growth

WHAT'S NEXT?

Modest growth despite ongoing challenges

Private label offerings could gain traction

Added-value drinks deliver above-average growth

COMPETITIVE LANDSCAPE

Birštono Mineraliniai Vandens and Coca-Cola remain key industry players

Private label fuels growth for Maxima while Red Bull benefits from expansion of energy drinks

CHANNELS

Supermarkets remains leading channel

Convenience stores leads growth while e-commerce continues to expand

Foodservice vs retail split

MARKET DATA

Table 1 - Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: Volume 2020-2025

Table 2 - Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: % Volume Growth 2020-2025

Table 3 - Off-trade vs On-trade Sales of Soft Drinks by Channel: Value 2020-2025

Table 4 - Off-trade vs On-trade Sales of Soft Drinks by Channel: % Value Growth 2020-2025

Table 5 - Off-trade vs On-trade Sales of Soft Drinks (as sold) by Category: Volume 2025

Table 6 - Off-trade vs On-trade Sales of Soft Drinks (as sold) by Category: % Volume 2025

Table 7 - Off-trade vs On-trade Sales of Soft Drinks by Category: Value 2025

Table 8 - Off-trade vs On-trade Sales of Soft Drinks by Category: % Value 2025

Table 9 - Off-trade Sales of Soft Drinks (RTD) by Category: Volume 2020-2025

Table 10 - Off-trade Sales of Soft Drinks (RTD) by Category: % Volume Growth 2020-2025

Table 11 - Off-trade Sales of Soft Drinks by Category: Value 2020-2025

Table 12 - Off-trade Sales of Soft Drinks by Category: % Value Growth 2020-2025

Table 13 - Sales of Soft Drinks by Total Fountain On-trade: Volume 2020-2025

Table 14 - Sales of Soft Drinks by Total Fountain On-trade: % Volume Growth 2020-2025

Table 15 - NBO Company Shares of Off-trade Soft Drinks (RTD): % Volume 2021-2025

Table 16 - LBN Brand Shares of Off-trade Soft Drinks (RTD): % Volume 2022-2025

Table 17 - NBO Company Shares of Off-trade Soft Drinks: % Value 2021-2025

Table 18 - LBN Brand Shares of Off-trade Soft Drinks: % Value 2022-2025

Table 19 - Penetration of Private Label in Off-trade Soft Drinks (RTD) by Category: % Volume 2020-2025

Table 20 - Penetration of Private Label in Off-trade Soft Drinks by Category: % Value 2020-2025

Table 21 - Distribution of Off-trade Soft Drinks (as sold) by Format: % Volume 2020-2025

Table 22 - Distribution of Off-trade Soft Drinks (as sold) by Format and Category: % Volume 2025

Table 23 - Forecast Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: Volume 2025-2030

Table 24 - Forecast Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: % Volume Growth 2025-2030

Table 25 - Forecast Off-trade vs On-trade Sales of Soft Drinks by Channel: Value 2025-2030

Table 26 - Forecast Off-trade vs On-trade Sales of Soft Drinks by Channel: % Value Growth 2025-2030

Table 27 - Forecast Off-trade Sales of Soft Drinks (RTD) by Category: Volume 2025-2030

Table 28 - Forecast Off-trade Sales of Soft Drinks (RTD) by Category: % Volume Growth 2025-2030

Table 29 - Forecast Off-trade Sales of Soft Drinks by Category: Value 2025-2030

Table 30 - Forecast Off-trade Sales of Soft Drinks by Category: % Value Growth 2025-2030

Table 31 - Forecast Sales of Soft Drinks by Total Fountain On-trade: Volume 2025-2030

Table 32 - Forecast Sales of Soft Drinks by Total Fountain On-trade: % Volume Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

SOURCES

Summary 1 - Research Sources

Bottled Water in Lithuania

KEY DATA FINDINGS

2025 DEVELOPMENTS

Weather and economic pressures hit sales

INDUSTRY PERFORMANCE

Bottled water fall sharply after a weak summer season

Functional bottled water retains some momentum

WHAT'S NEXT?

Functional variants will drive growth in weather-dependent category

Innovation will remain limited outside functional bottled water

Still natural mineral water will retain its stronghold amongst urban consumers

COMPETITIVE LANDSCAPE

Birštono Mineraliniai Vandenyi dominates sales

Fairfood Baltic gains momentum through functional water offerings

CHANNELS

Supermarkets maintains leadership in bottled water

E-commerce is fastest-growing channel

CATEGORY DATA

Table 33 - Off-trade Sales of Bottled Water by Category: Volume 2020-2025

Table 34 - Off-trade Sales of Bottled Water by Category: Value 2020-2025

Table 35 - Off-trade Sales of Bottled Water by Category: % Volume Growth 2020-2025

Table 36 - Off-trade Sales of Bottled Water by Category: % Value Growth 2020-2025

Table 37 - NBO Company Shares of Off-trade Bottled Water: % Volume 2021-2025

Table 38 - LBN Brand Shares of Off-trade Bottled Water: % Volume 2022-2025

Table 39 - NBO Company Shares of Off-trade Bottled Water: % Value 2021-2025

Table 40 - LBN Brand Shares of Off-trade Bottled Water: % Value 2022-2025

Table 41 - Forecast Off-trade Sales of Bottled Water by Category: Volume 2025-2030

Table 42 - Forecast Off-trade Sales of Bottled Water by Category: Value 2025-2030

Table 43 - Forecast Off-trade Sales of Bottled Water by Category: % Volume Growth 2025-2030

Table 44 - Forecast Off-trade Sales of Bottled Water by Category: % Value Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

Carbonates in Lithuania

KEY DATA FINDINGS

2025 DEVELOPMENTS

Declining demand as consumers shift towards healthier and functional alternatives

INDUSTRY PERFORMANCE

Cold summer weather hinders sales
Shift towards reduced sugar options

WHAT'S NEXT?

Modest expected growth amid increased competition
Sugar tax will impact prices of regular carbonates
Innovations will have little long-term impact

COMPETITIVE LANDSCAPE

Cola-Cola continues to lead sales
Lidl registers rapid growth

CHANNELS

Supermarkets remains leading channel
E-commerce continues to expand

CATEGORY DATA

Table 45 - Off-trade vs On-trade Sales of Carbonates: Volume 2020-2025
Table 46 - Off-trade vs On-trade Sales of Carbonates: Value 2020-2025
Table 47 - Off-trade vs On-trade Sales of Carbonates: % Volume Growth 2020-2025
Table 48 - Off-trade vs On-trade Sales of Carbonates: % Value Growth 2020-2025
Table 49 - Off-trade Sales of Carbonates by Category: Volume 2020-2025
Table 50 - Off-trade Sales of Carbonates by Category: Value 2020-2025
Table 51 - Off-trade Sales of Carbonates by Category: % Volume Growth 2020-2025
Table 52 - Off-trade Sales of Carbonates by Category: % Value Growth 2020-2025
Table 53 - Sales of Carbonates by Total Fountain On-trade: Volume 2020-2025
Table 54 - Sales of Carbonates by Total Fountain On-trade: % Volume Growth 2020-2025
Table 55 - NBO Company Shares of Off-trade Carbonates: % Volume 2021-2025
Table 56 - LBN Brand Shares of Off-trade Carbonates: % Volume 2022-2025
Table 57 - NBO Company Shares of Off-trade Carbonates: % Value 2021-2025
Table 58 - LBN Brand Shares of Off-trade Carbonates: % Value 2022-2025
Table 59 - Forecast Off-trade Sales of Carbonates by Category: Volume 2025-2030
Table 60 - Forecast Off-trade Sales of Carbonates by Category: Value 2025-2030
Table 61 - Forecast Off-trade Sales of Carbonates by Category: % Volume Growth 2025-2030
Table 62 - Forecast Off-trade Sales of Carbonates by Category: % Value Growth 2025-2030
Table 63 - Forecast Sales of Carbonates by Total Fountain On-trade: Volume 2025-2030
Table 64 - Forecast Sales of Carbonates by Total Fountain On-trade: % Volume Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

[Concentrates in Lithuania](#)

KEY DATA FINDINGS

2025 DEVELOPMENTS

Concentrates face stiff competition

INDUSTRY PERFORMANCE

Demand remains stagnant amid competition from more dynamic RTD alternatives
Liquid concentrates benefits from recent innovations

WHAT'S NEXT?

Modest growth for concentrates, driven by liquid formulations
Premium syrups could offer added-value opportunities
Sugar tax will likely push up prices

COMPETITIVE LANDSCAPE

Druskininku Rasa UAB leads sales
Lidl expands portfolio of liquid concentrates

CHANNELS

Supermarkets remains dominant channel
E-commerce plays key role in accessing niche products
Concentrates Conversions
Summary 2 - Concentrates Conversion Factors for Ready-to-Drink (RTD) Format

CATEGORY DATA

Table 65 - Off-trade Sales of Concentrates (RTD) by Category: Volume 2020-2025
Table 66 - Off-trade Sales of Concentrates by Category: Value 2020-2025
Table 67 - Off-trade Sales of Concentrates (RTD) by Category: % Volume Growth 2020-2025
Table 68 - Off-trade Sales of Concentrates by Category: % Value Growth 2020-2025
Table 69 - NBO Company Shares of Off-trade Concentrates (RTD): % Volume 2021-2025
Table 70 - LBN Brand Shares of Off-trade Concentrates (RTD): % Volume 2022-2025
Table 71 - NBO Company Shares of Off-trade Concentrates: % Value 2021-2025
Table 72 - LBN Brand Shares of Off-trade Concentrates: % Value 2022-2025
Table 73 - NBO Company Shares of Off-trade Liquid Concentrates (RTD): % Volume 2021-2025
Table 74 - LBN Brand Shares of Off-trade Liquid Concentrates (RTD): % Volume 2022-2025
Table 75 - NBO Company Shares of Off-trade Powder Concentrates (RTD): % Volume 2021-2025
Table 76 - LBN Brand Shares of Off-trade Powder Concentrates (RTD): % Volume 2022-2025
Table 77 - Forecast Off-trade Sales of Concentrates (RTD) by Category: Volume 2025-2030
Table 78 - Forecast Off-trade Sales of Concentrates by Category: Value 2025-2030
Table 79 - Forecast Off-trade Sales of Concentrates (RTD) by Category: % Volume Growth 2025-2030
Table 80 - Forecast Off-trade Sales of Concentrates by Category: % Value Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

[Juice in Lithuania](#)

KEY DATA FINDINGS

2025 DEVELOPMENTS

Juice faces ongoing challenges

INDUSTRY PERFORMANCE

Juice sales decline further in light of continuing price pressures
Not from concentrate 100% juice shows greatest resilience

WHAT'S NEXT?

Juice sales to decline further amid rising health concerns
Anticipated lack of innovation
New sugar tax will likely impact sales

COMPETITIVE LANDSCAPE

Lidl leads through strong private label portfolio
Maxima gains traction

CHANNELS

Supermarkets remains dominant channel

E-commerce and convenience stores show greatest resilience

CATEGORY DATA

Table 81 - Off-trade Sales of Juice by Category: Volume 2020-2025

Table 82 - Off-trade Sales of Juice by Category: Value 2020-2025

Table 83 - Off-trade Sales of Juice by Category: % Volume Growth 2020-2025

Table 84 - Off-trade Sales of Juice by Category: % Value Growth 2020-2025

Table 85 - NBO Company Shares of Off-trade Juice: % Volume 2021-2025

Table 86 - LBN Brand Shares of Off-trade Juice: % Volume 2022-2025

Table 87 - NBO Company Shares of Off-trade Juice: % Value 2021-2025

Table 88 - LBN Brand Shares of Off-trade Juice: % Value 2022-2025

Table 89 - Forecast Off-trade Sales of Juice by Category: Volume 2025-2030

Table 90 - Forecast Off-trade Sales of Juice by Category: Value 2025-2030

Table 91 - Forecast Off-trade Sales of Juice by Category: % Volume Growth 2025-2030

Table 92 - Forecast Off-trade Sales of Juice by Category: % Value Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

RTD Coffee in Lithuania

KEY DATA FINDINGS

2025 DEVELOPMENTS

Weak demand for RTD coffee

INDUSTRY PERFORMANCE

Modest growth amid seasonal and distribution challenges

Strong competition from energy drinks

WHAT'S NEXT?

Modest growth with seasonality and lack of investment remaining ongoing challenges

Limited innovation and consumer perceptions will constrain sales

Sugar tax will likely impact retail prices

COMPETITIVE LANDSCAPE

Paulig retains leading presence

Lidl continues to expand

CHANNELS

Supermarkets leads sales

E-commerce gains traction through convenience and value

CATEGORY DATA

Table 93 - Off-trade Sales of RTD Coffee: Volume 2020-2025

Table 94 - Off-trade Sales of RTD Coffee: Value 2020-2025

Table 95 - Off-trade Sales of RTD Coffee: % Volume Growth 2020-2025

Table 96 - Off-trade Sales of RTD Coffee: % Value Growth 2020-2025

Table 97 - NBO Company Shares of Off-trade RTD Coffee: % Volume 2021-2025

Table 98 - LBN Brand Shares of Off-trade RTD Coffee: % Volume 2022-2025

Table 99 - NBO Company Shares of Off-trade RTD Coffee: % Value 2021-2025

Table 100 - LBN Brand Shares of Off-trade RTD Coffee: % Value 2022-2025

Table 101 - Forecast Off-trade Sales of RTD Coffee: Volume 2025-2030

Table 102 - Forecast Off-trade Sales of RTD Coffee: Value 2025-2030

Table 103 - Forecast Off-trade Sales of RTD Coffee: % Volume Growth 2025-2030

Table 104 - Forecast Off-trade Sales of RTD Coffee: % Value Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

RTD Tea in Lithuania

KEY DATA FINDINGS

2025 DEVELOPMENTS

RTD tea continues to struggle

INDUSTRY PERFORMANCE

RTD tea faces declining sales amid strong competition from other soft drinks

Carbonated RTD tea and kombucha continues to show positive growth, but remains niche

WHAT'S NEXT?

RTD tea sales to remain stagnant amid growing competition

Kombucha will continue to post positive growth but take-up will remain limited

Sugar tax to impact prices and consumer choices

COMPETITIVE LANDSCAPE

Coca-Cola leads with Fuze Tea

Lidl's Freeway private label benefits from its affordability

CHANNELS

Supermarkets remains core distribution channel

E-commerce is fastest-growing channel

CATEGORY DATA

Table 105 - Off-trade Sales of RTD Tea by Category: Volume 2020-2025

Table 106 - Off-trade Sales of RTD Tea by Category: Value 2020-2025

Table 107 - Off-trade Sales of RTD Tea by Category: % Volume Growth 2020-2025

Table 108 - Off-trade Sales of RTD Tea by Category: % Value Growth 2020-2025

Table 109 - NBO Company Shares of Off-trade RTD Tea: % Volume 2021-2025

Table 110 - LBN Brand Shares of Off-trade RTD Tea: % Volume 2022-2025

Table 111 - NBO Company Shares of Off-trade RTD Tea: % Value 2021-2025

Table 112 - LBN Brand Shares of Off-trade RTD Tea: % Value 2022-2025

Table 113 - Forecast Off-trade Sales of RTD Tea by Category: Volume 2025-2030

Table 114 - Forecast Off-trade Sales of RTD Tea by Category: Value 2025-2030

Table 115 - Forecast Off-trade Sales of RTD Tea by Category: % Volume Growth 2025-2030

Table 116 - Forecast Off-trade Sales of RTD Tea by Category: % Value Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

Energy Drinks in Lithuania

KEY DATA FINDINGS

2025 DEVELOPMENTS

Energy drinks grow in popularity amid busy lifestyles

INDUSTRY PERFORMANCE

Rapid growth for energy drinks

Growing demand for reduced sugar formulations, although regular offerings continue to grow in popularity

WHAT'S NEXT?

Slowing, but sustained growth

Flavour innovation will be key growth driver

Upcoming sugar tax could impact consumption patterns

COMPETITIVE LANDSCAPE

Intense competition between leading global brands

Svyturys Utenos Alus UAB leads expansion

CHANNELS

Supermarkets remains key channel for energy drinks

E-commerce gains traction

CATEGORY DATA

Table 117 - Off-trade Sales of Energy Drinks: Volume 2020-2025

Table 118 - Off-trade Sales of Energy Drinks: Value 2020-2025

Table 119 - Off-trade Sales of Energy Drinks: % Volume Growth 2020-2025

Table 120 - Off-trade Sales of Energy Drinks: % Value Growth 2020-2025

Table 121 - NBO Company Shares of Off-trade Energy Drinks: % Volume 2021-2025

Table 122 - LBN Brand Shares of Off-trade Energy Drinks: % Volume 2022-2025

Table 123 - NBO Company Shares of Off-trade Energy Drinks: % Value 2021-2025

Table 124 - LBN Brand Shares of Off-trade Energy Drinks: % Value 2022-2025

Table 125 - Forecast Off-trade Sales of Energy Drinks: Volume 2025-2030

Table 126 - Forecast Off-trade Sales of Energy Drinks: Value 2025-2030

Table 127 - Forecast Off-trade Sales of Energy Drinks: % Volume Growth 2025-2030

Table 128 - Forecast Off-trade Sales of Energy Drinks: % Value Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

[Sports Drinks in Lithuania](#)

KEY DATA FINDINGS

2025 DEVELOPMENTS

Cold summer weather limits sales

INDUSTRY PERFORMANCE

Sports drinks sales remain flat in 2025

Reduced sugar offerings lead growth

WHAT'S NEXT?

Sports drinks poised for steady growth, driven by functional demand

Increased participation from local and regional players

Sugar tax set to raise prices and shift demand towards reduced-sugar offerings

COMPETITIVE LANDSCAPE

Mega Baltic UAB maintains strong leadership with Oshee

Smaller brands gain momentum

CHANNELS

Supermarkets remains leading distribution channel for sports drinks

E-commerce sees fastest growth

CATEGORY DATA

Table 129 - Off-trade Sales of Sports Drinks: Volume 2020-2025

Table 130 - Off-trade Sales of Sports Drinks: Value 2020-2025
Table 131 - Off-trade Sales of Sports Drinks: % Volume Growth 2020-2025
Table 132 - Off-trade Sales of Sports Drinks: % Value Growth 2020-2025
Table 133 - NBO Company Shares of Off-trade Sports Drinks: % Volume 2021-2025
Table 134 - LBN Brand Shares of Off-trade Sports Drinks: % Volume 2022-2025
Table 135 - NBO Company Shares of Off-trade Sports Drinks: % Value 2021-2025
Table 136 - LBN Brand Shares of Off-trade Sports Drinks: % Value 2022-2025
Table 137 - Forecast Off-trade Sales of Sports Drinks: Volume 2025-2030
Table 138 - Forecast Off-trade Sales of Sports Drinks: Value 2025-2030
Table 139 - Forecast Off-trade Sales of Sports Drinks: % Volume Growth 2025-2030
Table 140 - Forecast Off-trade Sales of Sports Drinks: % Value Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

About Euromonitor International

Euromonitor International is an independent market intelligence provider. Data, insight and analysis stem from in-the-field research spanning 210 national markets.

Content ranges from the in-depth and country-specific, to key strategic themes with a global range and significance. Products cover a comprehensive range of insights and market data, but can be broadly categorised as:

- **Strategy Briefings:** Global or regional in scope, and focussing on the most important themes shaping consumer demand, the key markets, competitive environment and future outlook across a range of industries.
- **Company Profiles:** Analysis dedicated to the world's most significant companies, with detailed insight into their activities, focus of operations, their competitors, their geographic presence and performance.
- **Country Reports:** For an in-depth understanding of specific countries, whether by industry, economic metrics or consumer trends and lifestyles. These reports cover current trends, consumer demand, market potential and future prospects, with country-specific local insight and comprehensive data, unavailable elsewhere.

For more information on this report, further enquiries can be directed via this link www.euromonitor.com/soft-drinks-in-lithuania/report.