



Euromonitor
International

Bottled Water in Estonia

December 2025

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Bottled Water in Estonia - Category analysis

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2025 DEVELOPMENTS

Functional and value-added waters lead growth amid challenging conditions

INDUSTRY PERFORMANCE

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Functional bottled water remains relatively resilient

WHAT'S NEXT?

Modest recovery expected as value-added offerings drive demand

Persistent demand for affordable bulk formats

Sugary-drink tax may boost demand for plain bottled water

COMPETITIVE LANDSCAPE

Värska Vesi AS leads bottled water

ETK Group drives growth with Säästu private label

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Soft Drinks in Estonia - Industry Overview

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Soft drink sales are impacted by weather, price rises, and changing consumer preferences

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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