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International

# Soft Drinks in Estonia

December 2025

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### EXECUTIVE SUMMARY

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

### KEY DATA FINDINGS

### INDUSTRY PERFORMANCE

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

Coca-Cola lead sales, thanks to strong positions in carbonates and energy drinks

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Functional and value-added waters lead growth amid challenging conditions

## INDUSTRY PERFORMANCE

Bottled water volumes under pressure amid price and poor weather conditions

Functional bottled water remains relatively resilient

## WHAT'S NEXT?

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Persistent demand for affordable bulk formats

Sugary-drink tax may boost demand for plain bottled water

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[Carbonates in Estonia](#)

## KEY DATA FINDINGS

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Challenging times for carbonates

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[Concentrates in Estonia](#)

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### 2025 DEVELOPMENTS

Weak positioning and lack of convenience hinder sales

## INDUSTRY PERFORMANCE

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## WHAT'S NEXT?

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Premium liquid offerings have potential for growth

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## COMPETITIVE LANDSCAPE

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Reduced sugar energy drinks leads growth

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Flavour innovations and experimental marketing will sustain consumer interest  
Sugar tax will impact manufacturer strategies

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