



Soft Drinks in Estonia

December 2025

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Soft Drinks in Estonia

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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Supermarkets and hypermarkets lead sales

Lidl drives growth of discounters

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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

COMPETITIVE LANDSCAPE

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[Carbonates in Estonia](#)

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[Concentrates in Estonia](#)

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2025 DEVELOPMENTS

Weak positioning and lack of convenience hinder sales

INDUSTRY PERFORMANCE

Persistent stagnation amid ongoing challenges

Powder concentrates show stability, while liquid offerings remain preferred choice

WHAT'S NEXT?

Gloomy outlook for concentrates

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Sugar tax will bring reformulation into focus

COMPETITIVE LANDSCAPE

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2025 DEVELOPMENTS

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COMPETITIVE LANDSCAPE

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RTD Coffee in Estonia

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[RTD Tea in Estonia](#)

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INDUSTRY PERFORMANCE

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Forthcoming sugar tax could encourage reformulation

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[Energy Drinks in Estonia](#)

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Reduced sugar variants lead growth

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Functional enhancements will remain central to sports drinks innovation

Sugary drinks tax likely to influence consumption

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