



Euromonitor
International

Energy Drinks in Estonia

December 2025

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Energy Drinks in Estonia - Category analysis

KEY DATA FINDINGS

2025 DEVELOPMENTS

Energy drinks benefit from growing demand for functional beverages

INDUSTRY PERFORMANCE

Energy drinks maintains strong upward growth trajectory

Reduced sugar energy drinks leads growth

WHAT'S NEXT?

Continued growth amid increasing competition

Flavour innovations and experimental marketing will sustain consumer interest

Sugar tax will impact manufacturer strategies

COMPETITIVE LANDSCAPE

Tridens remains leading player

Coca-Cola leads volume growth

CHANNELS

Supermarkets and convenience retailers lead sales

E-commerce is most dynamic channel

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Soft Drinks in Estonia - Industry Overview

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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