



Sports Drinks in Estonia

December 2025

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Sports Drinks in Estonia - Category analysis

KEY DATA FINDINGS

2025 DEVELOPMENTS

Wellness trends impact demand

INDUSTRY PERFORMANCE

Sports drinks maintains growth but faces competition from adjacent categories

Reduced sugar variants lead growth

WHAT'S NEXT?

Steady, yet slower growth amid competition from competing categories

Functional enhancements will remain central to sports drinks innovation

Sugary drinks tax likely to influence consumption

COMPETITIVE LANDSCAPE

A?Le?Coq AS leads amid growing competition

Apricot OÜ drives growth with Fat Burner

CHANNELS

Large grocery chains lead sales

Discounters 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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Foodservice vs retail split

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