

Carbonates in Latvia

December 2025

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KEY DATA FINDINGS

2025 DEVELOPMENTS

Shift towards lower-sugar offerings

INDUSTRY PERFORMANCE

Continued decline in carbonates
Reduced sugar cola carbonates show greatest resilience as health concerns accelerate

WHAT'S NEXT?

Carbonates set to stagnate as competition from other soft drinks and unfavourable demographic shifts weigh on growth
Players to scale back innovation
Excise duty increase will reshape carbonates

COMPETITIVE LANDSCAPE

Coca-Cola HBC Latvia SIA dominates carbonates
Pepsi Cola General Bottlers sees fastest growth

CHANNELS

Supermarkets leads the distribution landscape
Discounters shows greatest dynamism

CATEGORY DATA

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EXECUTIVE SUMMARY

Challenging year for soft drinks

KEY DATA FINDINGS

INDUSTRY PERFORMANCE

Cold summer temperatures impact demand
Energy drinks registers strong performance
Juice continues to struggle

WHAT'S NEXT?

Modest recovery for soft drinks
Added-value categories to drive future growth
Excise duty increase will reshape soft drinks market

COMPETITIVE LANDSCAPE

Cido Grupa and Cola-Cola dominate sales
Aldaris AS leads growth with Vichy bottled water

CHANNELS

Supermarkets remains largest channel
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E-commerce expands from low base
Foodservice vs retail split

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