



Euromonitor
International

Bottled Water in Estonia

December 2025

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KEY DATA FINDINGS

2025 DEVELOPMENTS

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?

Modest recovery expected as value-added offerings drive demand

Persistent demand for affordable bulk formats

Sugary-drink tax may boost demand for plain bottled water

COMPETITIVE LANDSCAPE

Värska Vesi AS leads bottled water

ETK Group drives growth with Säästu private label

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Supermarkets and hypermarkets lead sales

Discounters channel drives growth

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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

CHANNELS

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