



Soft Drinks in Estonia

December 2025

Table of Contents

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

Supermarkets and hypermarkets lead sales

Lidl drives growth of discounters

Foodservice vs retail split

MARKET DATA

Table 1 - Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: Volume 2020-2025

Table 2 - Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: % Volume Growth 2020-2025

Table 3 - Off-trade vs On-trade Sales of Soft Drinks by Channel: Value 2020-2025

Table 4 - Off-trade vs On-trade Sales of Soft Drinks by Channel: % Value Growth 2020-2025

Table 5 - Off-trade vs On-trade Sales of Soft Drinks (as sold) by Category: Volume 2025

Table 6 - Off-trade vs On-trade Sales of Soft Drinks (as sold) by Category: % Volume 2025

Table 7 - Off-trade vs On-trade Sales of Soft Drinks by Category: Value 2025

Table 8 - Off-trade vs On-trade Sales of Soft Drinks by Category: % Value 2025

Table 9 - Off-trade Sales of Soft Drinks (RTD) by Category: Volume 2020-2025

Table 10 - Off-trade Sales of Soft Drinks (RTD) by Category: % Volume Growth 2020-2025

Table 11 - Off-trade Sales of Soft Drinks by Category: Value 2020-2025

Table 12 - Off-trade Sales of Soft Drinks by Category: % Value Growth 2020-2025

Table 13 - Sales of Soft Drinks by Total Fountain On-trade: Volume 2020-2025

Table 14 - Sales of Soft Drinks by Total Fountain On-trade: % Volume Growth 2020-2025

Table 15 - NBO Company Shares of Off-trade Soft Drinks (RTD): % Volume 2021-2025

Table 16 - LBN Brand Shares of Off-trade Soft Drinks (RTD): % Volume 2022-2025

Table 17 - NBO Company Shares of Off-trade Soft Drinks: % Value 2021-2025

Table 18 - LBN Brand Shares of Off-trade Soft Drinks: % Value 2022-2025

Table 19 - Penetration of Private Label in Off-trade Soft Drinks (RTD) by Category: % Volume 2020-2025

Table 20 - Penetration of Private Label in Off-trade Soft Drinks by Category: % Value 2020-2025

Table 21 - Distribution of Off-trade Soft Drinks (as sold) by Format: % Volume 2020-2025

Table 22 - Distribution of Off-trade Soft Drinks (as sold) by Format and Category: % Volume 2025

Table 23 - Forecast Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: Volume 2025-2030

Table 24 - Forecast Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: % Volume Growth 2025-2030

Table 25 - Forecast Off-trade vs On-trade Sales of Soft Drinks by Channel: Value 2025-2030

Table 26 - Forecast Off-trade vs On-trade Sales of Soft Drinks by Channel: % Value Growth 2025-2030

Table 27 - Forecast Off-trade Sales of Soft Drinks (RTD) by Category: Volume 2025-2030

Table 28 - Forecast Off-trade Sales of Soft Drinks (RTD) by Category: % Volume Growth 2025-2030

Table 29 - Forecast Off-trade Sales of Soft Drinks by Category: Value 2025-2030

Table 30 - Forecast Off-trade Sales of Soft Drinks by Category: % Value Growth 2025-2030

Table 31 - Forecast Sales of Soft Drinks by Total Fountain On-trade: Volume 2025-2030

Table 32 - Forecast Sales of Soft Drinks by Total Fountain On-trade: % Volume Growth 2025-2030

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SOURCES

Summary 1 - Research Sources

[Bottled Water in Estonia](#)

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

CHANNELS

Supermarkets and hypermarkets lead sales

Discounters channel drives growth

CATEGORY DATA

Table 33 - Off-trade Sales of Bottled Water by Category: Volume 2020-2025

Table 34 - Off-trade Sales of Bottled Water by Category: Value 2020-2025

Table 35 - Off-trade Sales of Bottled Water by Category: % Volume Growth 2020-2025

Table 36 - Off-trade Sales of Bottled Water by Category: % Value Growth 2020-2025

Table 37 - NBO Company Shares of Off-trade Bottled Water: % Volume 2021-2025

Table 38 - LBN Brand Shares of Off-trade Bottled Water: % Volume 2022-2025

Table 39 - NBO Company Shares of Off-trade Bottled Water: % Value 2021-2025

Table 40 - LBN Brand Shares of Off-trade Bottled Water: % Value 2022-2025

Table 41 - Forecast Off-trade Sales of Bottled Water by Category: Volume 2025-2030

Table 42 - Forecast Off-trade Sales of Bottled Water by Category: Value 2025-2030

Table 43 - Forecast Off-trade Sales of Bottled Water by Category: % Volume Growth 2025-2030

Table 44 - Forecast Off-trade Sales of Bottled Water by Category: % Value Growth 2025-2030

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[Carbonates in Estonia](#)

KEY DATA FINDINGS

2025 DEVELOPMENTS

Challenging times for carbonates

INDUSTRY PERFORMANCE

VAT increase and cold summer weather weigh on off-trade carbonates

Reduced sugar colas lead volume growth

WHAT'S NEXT?

Carbonates faces stagnation amid health trends and maturity

Flavour innovation will be limited as focus shifts to sugar-free variants

COMPETITIVE LANDSCAPE

Coca-Cola continues to dominate sales

Lidl drives growth through private label Freeway range

CHANNELS

Supermarkets and hypermarkets lead sales

Discounters channel drives growth

CATEGORY DATA

Table 45 - Off-trade vs On-trade Sales of Carbonates: Volume 2020-2025

Table 46 - Off-trade vs On-trade Sales of Carbonates: Value 2020-2025

Table 47 - Off-trade vs On-trade Sales of Carbonates: % Volume Growth 2020-2025

Table 48 - Off-trade vs On-trade Sales of Carbonates: % Value Growth 2020-2025

Table 49 - Off-trade Sales of Carbonates by Category: Volume 2020-2025

Table 50 - Off-trade Sales of Carbonates by Category: Value 2020-2025

Table 51 - Off-trade Sales of Carbonates by Category: % Volume Growth 2020-2025

Table 52 - Off-trade Sales of Carbonates by Category: % Value Growth 2020-2025

Table 53 - Sales of Carbonates by Total Fountain On-trade: Volume 2020-2025

Table 54 - Sales of Carbonates by Total Fountain On-trade: % Volume Growth 2020-2025

Table 55 - NBO Company Shares of Off-trade Carbonates: % Volume 2021-2025

Table 56 - LBN Brand Shares of Off-trade Carbonates: % Volume 2022-2025

Table 57 - NBO Company Shares of Off-trade Carbonates: % Value 2021-2025

Table 58 - LBN Brand Shares of Off-trade Carbonates: % Value 2022-2025

Table 59 - Forecast Off-trade Sales of Carbonates by Category: Volume 2025-2030

Table 60 - Forecast Off-trade Sales of Carbonates by Category: Value 2025-2030

Table 61 - Forecast Off-trade Sales of Carbonates by Category: % Volume Growth 2025-2030

Table 62 - Forecast Off-trade Sales of Carbonates by Category: % Value Growth 2025-2030

Table 63 - Forecast Sales of Carbonates by Total Fountain On-trade: Volume 2025-2030

Table 64 - Forecast Sales of Carbonates by Total Fountain On-trade: % Volume Growth 2025-2030

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[Concentrates in Estonia](#)

KEY DATA FINDINGS

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

Premium liquid offerings have potential for growth

Sugar tax will bring reformulation into focus

COMPETITIVE LANDSCAPE

Orkla Eesti AS leads concentrates

Okla Eesti AS strengthens its position, thanks to deep knowledge of local tastes

CHANNELS

Supermarkets and hypermarkets lead sales

Discounters channel sees rapid growth

Concentrates Conversions

Summary 2 - Concentrates Conversion Factors for Ready-to-Drink (RTD) Format

CATEGORY DATA

Table 65 - Off-trade Sales of Concentrates (RTD) by Category: Volume 2020-2025

Table 66 - Off-trade Sales of Concentrates by Category: Value 2020-2025

Table 67 - Off-trade Sales of Concentrates (RTD) by Category: % Volume Growth 2020-2025

Table 68 - Off-trade Sales of Concentrates by Category: % Value Growth 2020-2025

Table 69 - NBO Company Shares of Off-trade Concentrates (RTD): % Volume 2021-2025

Table 70 - LBN Brand Shares of Off-trade Concentrates (RTD): % Volume 2022-2025

Table 71 - NBO Company Shares of Off-trade Concentrates: % Value 2021-2025

Table 72 - LBN Brand Shares of Off-trade Concentrates: % Value 2022-2025

Table 73 - NBO Company Shares of Off-trade Liquid Concentrates (RTD): % Volume 2021-2025

Table 74 - LBN Brand Shares of Off-trade Liquid Concentrates (RTD): % Volume 2022-2025

Table 75 - NBO Company Shares of Off-trade Powder Concentrates (RTD): % Volume 2021-2025

Table 76 - LBN Brand Shares of Off-trade Powder Concentrates (RTD): % Volume 2022-2025

Table 77 - Forecast Off-trade Sales of Concentrates (RTD) by Category: Volume 2025-2030

Table 78 - Forecast Off-trade Sales of Concentrates by Category: Value 2025-2030

Table 79 - Forecast Off-trade Sales of Concentrates (RTD) by Category: % Volume Growth 2025-2030

Table 80 - Forecast Off-trade Sales of Concentrates by Category: % Value Growth 2025-2030

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[Juice in Estonia](#)

KEY DATA FINDINGS

2025 DEVELOPMENTS

Growing health awareness hampers sales

INDUSTRY PERFORMANCE

Off-trade juice volumes continue to decline

Not from concentrate juice shows greatest resilience

WHAT'S NEXT?

Juice volumes set to decline amid competition from alternative beverages

Limited innovation and rising private label presence

Proposed sugar tax may impact juice consumption

COMPETITIVE LANDSCAPE

A ?Le?Coq AS remains top juice player, but faces rising pressure from private label

Lidl Eesti OÜ emerges as a fastest-growing player with private label Solevita

CHANNELS

Supermarkets and hypermarkets lead sales
Discounters channel drives growth

CATEGORY DATA

Table 81 - Off-trade Sales of Juice by Category: Volume 2020-2025
Table 82 - Off-trade Sales of Juice by Category: Value 2020-2025
Table 83 - Off-trade Sales of Juice by Category: % Volume Growth 2020-2025
Table 84 - Off-trade Sales of Juice by Category: % Value Growth 2020-2025
Table 85 - NBO Company Shares of Off-trade Juice: % Volume 2021-2025
Table 86 - LBN Brand Shares of Off-trade Juice: % Volume 2022-2025
Table 87 - NBO Company Shares of Off-trade Juice: % Value 2021-2025
Table 88 - LBN Brand Shares of Off-trade Juice: % Value 2022-2025
Table 89 - Forecast Off-trade Sales of Juice by Category: Volume 2025-2030
Table 90 - Forecast Off-trade Sales of Juice by Category: Value 2025-2030
Table 91 - Forecast Off-trade Sales of Juice by Category: % Volume Growth 2025-2030
Table 92 - Forecast Off-trade Sales of Juice by Category: % Value Growth 2025-2030

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[RTD Coffee in Estonia](#)

KEY DATA FINDINGS

2025 DEVELOPMENTS

Demand for RTD coffee remains highly seasonal

INDUSTRY PERFORMANCE

RTD coffee remains a niche beverage
Differentiation remains limited

WHAT'S NEXT?

RTD coffee will retain niche status
RTD could benefit from convenience and functional appeal
Planned sugary-drinks tax may influence RTD coffee consumption

COMPETITIVE LANDSCAPE

Paulig continues to strengthen its leading presence
Eugesta Eesti gains traction with Starbucks-branded products

CHANNELS

Supermarkets and hypermarkets remain primary distribution channels
Discounters continues to expand

CATEGORY DATA

Table 93 - Off-trade Sales of RTD Coffee: Volume 2020-2025
Table 94 - Off-trade Sales of RTD Coffee: Value 2020-2025
Table 95 - Off-trade Sales of RTD Coffee: % Volume Growth 2020-2025
Table 96 - Off-trade Sales of RTD Coffee: % Value Growth 2020-2025
Table 97 - NBO Company Shares of Off-trade RTD Coffee: % Volume 2021-2025
Table 98 - LBN Brand Shares of Off-trade RTD Coffee: % Volume 2022-2025
Table 99 - NBO Company Shares of Off-trade RTD Coffee: % Value 2021-2025
Table 100 - LBN Brand Shares of Off-trade RTD Coffee: % Value 2022-2025
Table 101 - Forecast Off-trade Sales of RTD Coffee: Volume 2025-2030
Table 102 - Forecast Off-trade Sales of RTD Coffee: Value 2025-2030

Table 103 - Forecast Off-trade Sales of RTD Coffee: % Volume Growth 2025-2030

Table 104 - Forecast Off-trade Sales of RTD Coffee: % Value Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

RTD Tea in Estonia

KEY DATA FINDINGS

2025 DEVELOPMENTS

RTD tea faces ongoing pressures

INDUSTRY PERFORMANCE

Declining sales amid competition from more innovative RTD offerings

Reduced sugar offerings show greatest resilience

WHAT'S NEXT?

Continued decline for RTD tea

Private label could gain visibility

Forthcoming sugar tax could encourage reformulation

COMPETITIVE LANDSCAPE

Cola-Cola maintains leadership with Nestea

Private label expands from low base

CHANNELS

Supermarkets and hypermarkets lead sales

E-commerce continues to gain traction

CATEGORY DATA

Table 105 - Off-trade Sales of RTD Tea by Category: Volume 2020-2025

Table 106 - Off-trade Sales of RTD Tea by Category: Value 2020-2025

Table 107 - Off-trade Sales of RTD Tea by Category: % Volume Growth 2020-2025

Table 108 - Off-trade Sales of RTD Tea by Category: % Value Growth 2020-2025

Table 109 - NBO Company Shares of Off-trade RTD Tea: % Volume 2021-2025

Table 110 - LBN Brand Shares of Off-trade RTD Tea: % Volume 2022-2025

Table 111 - NBO Company Shares of Off-trade RTD Tea: % Value 2021-2025

Table 112 - LBN Brand Shares of Off-trade RTD Tea: % Value 2022-2025

Table 113 - Forecast Off-trade Sales of RTD Tea by Category: Volume 2025-2030

Table 114 - Forecast Off-trade Sales of RTD Tea by Category: Value 2025-2030

Table 115 - Forecast Off-trade Sales of RTD Tea by Category: % Volume Growth 2025-2030

Table 116 - Forecast Off-trade Sales of RTD Tea by Category: % Value Growth 2025-2030

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Energy Drinks in Estonia

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

Table 117 - Off-trade Sales of Energy Drinks: Volume 2020-2025

Table 118 - Off-trade Sales of Energy Drinks: Value 2020-2025

Table 119 - Off-trade Sales of Energy Drinks: % Volume Growth 2020-2025

Table 120 - Off-trade Sales of Energy Drinks: % Value Growth 2020-2025

Table 121 - NBO Company Shares of Off-trade Energy Drinks: % Volume 2021-2025

Table 122 - LBN Brand Shares of Off-trade Energy Drinks: % Volume 2022-2025

Table 123 - NBO Company Shares of Off-trade Energy Drinks: % Value 2021-2025

Table 124 - LBN Brand Shares of Off-trade Energy Drinks: % Value 2022-2025

Table 125 - Forecast Off-trade Sales of Energy Drinks: Volume 2025-2030

Table 126 - Forecast Off-trade Sales of Energy Drinks: Value 2025-2030

Table 127 - Forecast Off-trade Sales of Energy Drinks: % Volume Growth 2025-2030

Table 128 - Forecast Off-trade Sales of Energy Drinks: % Value Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

Sports Drinks in Estonia

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

CATEGORY DATA

Table 129 - Off-trade Sales of Sports Drinks: Volume 2020-2025

Table 130 - Off-trade Sales of Sports Drinks: Value 2020-2025

Table 131 - Off-trade Sales of Sports Drinks: % Volume Growth 2020-2025

Table 132 - Off-trade Sales of Sports Drinks: % Value Growth 2020-2025

Table 133 - NBO Company Shares of Off-trade Sports Drinks: % Volume 2021-2025

Table 134 - LBN Brand Shares of Off-trade Sports Drinks: % Volume 2022-2025

Table 135 - NBO Company Shares of Off-trade Sports Drinks: % Value 2021-2025

Table 136 - LBN Brand Shares of Off-trade Sports Drinks: % Value 2022-2025

Table 137 - Forecast Off-trade Sales of Sports Drinks: Volume 2025-2030

Table 138 - Forecast Off-trade Sales of Sports Drinks: Value 2025-2030

Table 139 - Forecast Off-trade Sales of Sports Drinks: % Volume Growth 2025-2030

Table 140 - Forecast Off-trade Sales of Sports Drinks: % Value Growth 2025-2030

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