



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

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Supermarkets and convenience retailers lead sales

E-commerce is most dynamic channel

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### 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

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