

# Carbonates in Lithuania

December 2025

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KEY DATA FINDINGS

2025 DEVELOPMENTS

Declining demand as consumers shift towards healthier and functional alternatives

INDUSTRY PERFORMANCE

Cold summer weather hinders sales  
Shift towards reduced sugar options

WHAT'S NEXT?

Modest expected growth amid increased competition  
Sugar tax will impact prices of regular carbonates  
Innovations will have little long-term impact

COMPETITIVE LANDSCAPE

Cola-Cola continues to lead sales  
Lidl registers rapid growth

CHANNELS

Supermarkets remains leading channel  
E-commerce continues to expand

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EXECUTIVE SUMMARY

Soft drinks under pressure from weather, price pressures and health trends

KEY DATA FINDINGS

## INDUSTRY PERFORMANCE

Soft drinks volumes decline amid cold summer weather and creeping inflation

Shift towards low sugar options

Energy drinks drives growth

## WHAT'S NEXT?

Modest growth despite ongoing challenges

Private label offerings could gain traction

Added-value drinks deliver above-average growth

## COMPETITIVE LANDSCAPE

Birštono Mineraliniai Vandenys and Coca-Cola remain key industry players

Private label fuels growth for Maxima while Red Bull benefits from expansion of energy drinks

## CHANNELS

Supermarkets remains leading channel

Convenience stores leads growth while e-commerce continues to expand

Foodservice vs retail split

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