



Euromonitor  
International

# Concentrates in Estonia

December 2025

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## Concentrates in Estonia - Category analysis

### 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

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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

Supermarkets and hypermarkets lead sales

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