

Carbonates in Latvia

December 2025

Table of Contents

KEY DATA FINDINGS

2025 DEVELOPMENTS

Shift towards lower-sugar offerings

INDUSTRY PERFORMANCE

Continued decline in carbonates
Reduced sugar cola carbonates show greatest resilience as health concerns accelerate

WHAT'S NEXT?

Carbonates set to stagnate as competition from other soft drinks and unfavourable demographic shifts weigh on growth
Players to scale back innovation
Excise duty increase will reshape carbonates

COMPETITIVE LANDSCAPE

Coca-Cola HBC Latvia SIA dominates carbonates
Pepsi Cola General Bottlers sees fastest growth

CHANNELS

Supermarkets leads the distribution landscape
Discounters shows greatest dynamism

CATEGORY DATA

- Table 1 - Off-trade vs On-trade Sales of Carbonates: Volume 2020-2025
- Table 2 - Off-trade vs On-trade Sales of Carbonates: Value 2020-2025
- Table 3 - Off-trade vs On-trade Sales of Carbonates: % Volume Growth 2020-2025
- Table 4 - Off-trade vs On-trade Sales of Carbonates: % Value Growth 2020-2025
- Table 5 - Off-trade Sales of Carbonates by Category: Volume 2020-2025
- Table 6 - Off-trade Sales of Carbonates by Category: Value 2020-2025
- Table 7 - Off-trade Sales of Carbonates by Category: % Volume Growth 2020-2025
- Table 8 - Off-trade Sales of Carbonates by Category: % Value Growth 2020-2025
- Table 9 - Sales of Carbonates by Total Fountain On-trade: Volume 2020-2025
- Table 10 - Sales of Carbonates by Total Fountain On-trade: % Volume Growth 2020-2025
- Table 11 - NBO Company Shares of Off-trade Carbonates: % Volume 2021-2025
- Table 12 - LBN Brand Shares of Off-trade Carbonates: % Volume 2022-2025
- Table 13 - NBO Company Shares of Off-trade Carbonates: % Value 2021-2025
- Table 14 - LBN Brand Shares of Off-trade Carbonates: % Value 2022-2025
- Table 15 - Forecast Off-trade Sales of Carbonates by Category: Volume 2025-2030
- Table 16 - Forecast Off-trade Sales of Carbonates by Category: Value 2025-2030
- Table 17 - Forecast Off-trade Sales of Carbonates by Category: % Volume Growth 2025-2030
- Table 18 - Forecast Off-trade Sales of Carbonates by Category: % Value Growth 2025-2030
- Table 19 - Forecast Sales of Carbonates by Total Fountain On-trade: Volume 2025-2030
- Table 20 - Forecast Sales of Carbonates by Total Fountain On-trade: % Volume Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

EXECUTIVE SUMMARY

Challenging year for soft drinks

KEY DATA FINDINGS

INDUSTRY PERFORMANCE

Cold summer temperatures impact demand

Energy drinks registers strong performance

Juice continues to struggle

WHAT'S NEXT?

Modest recovery for soft drinks

Added-value categories to drive future growth

Excise duty increase will reshape soft drinks market

COMPETITIVE LANDSCAPE

Cido Grupa and Cola-Cola dominate sales

Aldaris AS leads growth with Vichy bottled water

CHANNELS

Supermarkets remains largest channel

Discounters gains traction

E-commerce expands from low base

Foodservice vs retail split

MARKET DATA

Table 21 - Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: Volume 2020-2025

Table 22 - Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: % Volume Growth 2020-2025

Table 23 - Off-trade vs On-trade Sales of Soft Drinks by Channel: Value 2020-2025

Table 24 - Off-trade vs On-trade Sales of Soft Drinks by Channel: % Value Growth 2020-2025

Table 25 - Off-trade vs On-trade Sales of Soft Drinks (as sold) by Category: Volume 2025

Table 26 - Off-trade vs On-trade Sales of Soft Drinks (as sold) by Category: % Volume 2025

Table 27 - Off-trade vs On-trade Sales of Soft Drinks by Category: Value 2025

Table 28 - Off-trade vs On-trade Sales of Soft Drinks by Category: % Value 2025

Table 29 - Off-trade Sales of Soft Drinks (RTD) by Category: Volume 2020-2025

Table 30 - Off-trade Sales of Soft Drinks (RTD) by Category: % Volume Growth 2020-2025

Table 31 - Off-trade Sales of Soft Drinks by Category: Value 2020-2025

Table 32 - Off-trade Sales of Soft Drinks by Category: % Value Growth 2020-2025

Table 33 - Sales of Soft Drinks by Total Fountain On-trade: Volume 2020-2025

Table 34 - Sales of Soft Drinks by Total Fountain On-trade: % Volume Growth 2020-2025

Table 35 - NBO Company Shares of Off-trade Soft Drinks (RTD): % Volume 2021-2025

Table 36 - LBN Brand Shares of Off-trade Soft Drinks (RTD): % Volume 2022-2025

Table 37 - NBO Company Shares of Off-trade Soft Drinks: % Value 2021-2025

Table 38 - LBN Brand Shares of Off-trade Soft Drinks: % Value 2022-2025

Table 39 - Penetration of Private Label in Off-trade Soft Drinks (RTD) by Category: % Volume 2020-2025

Table 40 - Penetration of Private Label in Off-trade Soft Drinks by Category: % Value 2020-2025

Table 41 - Distribution of Off-trade Soft Drinks (as sold) by Format: % Volume 2020-2025

Table 42 - Distribution of Off-trade Soft Drinks (as sold) by Format and Category: % Volume 2025

Table 43 - Forecast Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: Volume 2025-2030

Table 44 - Forecast Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: % Volume Growth 2025-2030

Table 45 - Forecast Off-trade vs On-trade Sales of Soft Drinks by Channel: Value 2025-2030

Table 46 - Forecast Off-trade vs On-trade Sales of Soft Drinks by Channel: % Value Growth 2025-2030

Table 47 - Forecast Off-trade Sales of Soft Drinks (RTD) by Category: Volume 2025-2030

Table 48 - Forecast Off-trade Sales of Soft Drinks (RTD) by Category: % Volume Growth 2025-2030

Table 49 - Forecast Off-trade Sales of Soft Drinks by Category: Value 2025-2030

Table 50 - Forecast Off-trade Sales of Soft Drinks by Category: % Value Growth 2025-2030

Table 51 - Forecast Sales of Soft Drinks by Total Fountain On-trade: Volume 2025-2030

Table 52 - Forecast Sales of Soft Drinks by Total Fountain On-trade: % Volume Growth 2025-2030

SOURCES

Summary 1 - Research Sources

About Euromonitor International

Euromonitor International is an independent market intelligence provider. Data, insight and analysis stem from in-the-field research spanning 210 national markets.

Content ranges from the in-depth and country-specific, to key strategic themes with a global range and significance. Products cover a comprehensive range of insights and market data, but can be broadly categorised as:

- **Strategy Briefings:** Global or regional in scope, and focussing on the most important themes shaping consumer demand, the key markets, competitive environment and future outlook across a range of industries.
- **Company Profiles:** Analysis dedicated to the world's most significant companies, with detailed insight into their activities, focus of operations, their competitors, their geographic presence and performance.
- **Country Reports:** For an in-depth understanding of specific countries, whether by industry, economic metrics or consumer trends and lifestyles. These reports cover current trends, consumer demand, market potential and future prospects, with country-specific local insight and comprehensive data, unavailable elsewhere.

For more information on this report, further enquiries can be directed via this link www.euromonitor.com/carbonates-in-latvia/report.