



Euromonitor  
International

# RTD Coffee in Estonia

December 2025

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## RTD Coffee in Estonia - Category analysis

### 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

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Supermarkets and hypermarkets remain primary distribution channels

Discounters continues to expand

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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

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Supermarkets and hypermarkets lead sales

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For more information on this report, further enquiries can be directed via this link [www.euromonitor.com/rtd-coffee-in-estonia/report](http://www.euromonitor.com/rtd-coffee-in-estonia/report).