



Juice in Estonia

December 2025

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Juice in Estonia - Category analysis

KEY DATA FINDINGS

2025 DEVELOPMENTS

Growing health awareness hampers sales

INDUSTRY PERFORMANCE

Off-trade juice volumes continue to decline

Not from concentrate juice shows greatest resilience

WHAT'S NEXT?

Juice volumes set to decline amid competition from alternative beverages

Limited innovation and rising private label presence

Proposed sugar tax may impact juice consumption

COMPETITIVE LANDSCAPE

A ?Le?Coq AS remains top juice player, but faces rising pressure from private label

Lidl Eesti OÜ emerges as a fastest-growing player with private label Solevita

CHANNELS

Supermarkets and hypermarkets lead sales

Discounters channel drives growth

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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

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