

Soft Drinks in Estonia

January 2024

Table of Contents

Soft Drinks in Estonia

EXECUTIVE SUMMARY

Soft drinks in 2023: The big picture

2023 key trends

Competitive landscape

Retailing developments

Foodservice v retail split

What next for soft drinks?

MARKET DATA

Table 1 - Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: Volume 2018-2023

Table 2 - Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: % Volume Growth 2018-2023

Table 3 - Off-trade vs On-trade Sales of Soft Drinks by Channel: Value 2018-2023

Table 4 - Off-trade vs On-trade Sales of Soft Drinks by Channel: % Value Growth 2018-2023

Table 5 - Off-trade vs On-trade Sales of Soft Drinks (as sold) by Category: Volume 2023

Table 6 - Off-trade vs On-trade Sales of Soft Drinks (as sold) by Category: % Volume 2023

Table 7 - Off-trade vs On-trade Sales of Soft Drinks by Category: Value 2023

Table 8 - Off-trade vs On-trade Sales of Soft Drinks by Category: % Value 2023

Table 9 - Off-trade Sales of Soft Drinks (RTD) by Category: Volume 2018-2023

Table 10 - Off-trade Sales of Soft Drinks (RTD) by Category: % Volume Growth 2018-2023

Table 11 - Off-trade Sales of Soft Drinks by Category: Value 2018-2023

Table 12 - Off-trade Sales of Soft Drinks by Category: % Value Growth 2018-2023

Table 13 - Sales of Soft Drinks by Total Fountain On-trade: Volume 2018-2023

Table 14 - Sales of Soft Drinks by Total Fountain On-trade: % Volume Growth 2018-2023

Table 15 - NBO Company Shares of Off-trade Soft Drinks (RTD): % Volume 2019-2023

Table 16 - LBN Brand Shares of Off-trade Soft Drinks (RTD): % Volume 2020-2023

Table 17 - NBO Company Shares of Off-trade Soft Drinks: % Value 2019-2023

Table 18 - LBN Brand Shares of Off-trade Soft Drinks: % Value 2020-2023

Table 19 - Penetration of Private Label in Off-trade Soft Drinks (RTD) by Category: % Volume 2018-2023

Table 20 - Penetration of Private Label in Off-trade Soft Drinks by Category: % Value 2018-2023

Table 21 - Distribution of Off-trade Soft Drinks (as sold) by Format: % Volume 2018-2023

Table 22 - Distribution of Off-trade Soft Drinks (as sold) by Format and Category: % Volume 2023

Table 23 - Forecast Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: Volume 2023-2028

Table 24 - Forecast Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: % Volume Growth 2023-2028

Table 25 - Forecast Off-trade vs On-trade Sales of Soft Drinks by Channel: Value 2023-2028

Table 26 - Forecast Off-trade vs On-trade Sales of Soft Drinks by Channel: % Value Growth 2023-2028

Table 27 - Forecast Off-trade Sales of Soft Drinks (RTD) by Category: Volume 2023-2028

Table 28 - Forecast Off-trade Sales of Soft Drinks (RTD) by Category: % Volume Growth 2023-2028

Table 29 - Forecast Off-trade Sales of Soft Drinks by Category: Value 2023-2028

Table 30 - Forecast Off-trade Sales of Soft Drinks by Category: % Value Growth 2023-2028

Table 31 - Forecast Sales of Soft Drinks by Total Fountain On-trade: Volume 2023-2028

Table 32 - Forecast Sales of Soft Drinks by Total Fountain On-trade: % Volume Growth 2023-2028

DISCLAIMER

SOURCES

Summary 1 - Research Sources

Bottled Water in Estonia

KEY DATA FINDINGS

2023 DEVELOPMENTS

Functional bottled water gains popularity among health-conscious consumers

The demand for still natural mineral bottled water grows

Väraska Vesi leverages health benefit claims to lead bottled water

PROSPECTS AND OPPORTUNITIES

Health and wellness and sporty lifestyle trends promote the consumption of functional bottled water

Still natural mineral bottled water to leverage pure and natural positioning

Still spring bottled water develops an audience within foodservice

CATEGORY DATA

Table 33 - Off-trade Sales of Bottled Water by Category: Volume 2018-2023

Table 34 - Off-trade Sales of Bottled Water by Category: Value 2018-2023

Table 35 - Off-trade Sales of Bottled Water by Category: % Volume Growth 2018-2023

Table 36 - Off-trade Sales of Bottled Water by Category: % Value Growth 2018-2023

Table 37 - NBO Company Shares of Off-trade Bottled Water: % Volume 2019-2023

Table 38 - LBN Brand Shares of Off-trade Bottled Water: % Volume 2020-2023

Table 39 - NBO Company Shares of Off-trade Bottled Water: % Value 2019-2023

Table 40 - LBN Brand Shares of Off-trade Bottled Water: % Value 2020-2023

Table 41 - Forecast Off-trade Sales of Bottled Water by Category: Volume 2023-2028

Table 42 - Forecast Off-trade Sales of Bottled Water by Category: Value 2023-2028

Table 43 - Forecast Off-trade Sales of Bottled Water by Category: % Volume Growth 2023-2028

Table 44 - Forecast Off-trade Sales of Bottled Water by Category: % Value Growth 2023-2028

Carbonates in Estonia

KEY DATA FINDINGS

2023 DEVELOPMENTS

Reduced sugar drinks become more popular and visible

Popularisation of cocktails drives category development

Coca-Cola HBC Eesti invests to maintain category dominance

PROSPECTS AND OPPORTUNITIES

Regular tonic water/mixers/other bitters to continue to see strong growth in demand

Healthy lifestyle trend to promote the consumption of reduced sugar cola carbonates

Regular "other" non-cola carbonates remain popular

CATEGORY DATA

Table 45 - Off-trade vs On-trade Sales of Carbonates: Volume 2018-2023

Table 46 - Off-trade vs On-trade Sales of Carbonates: Value 2018-2023

Table 47 - Off-trade vs On-trade Sales of Carbonates: % Volume Growth 2018-2023

Table 48 - Off-trade vs On-trade Sales of Carbonates: % Value Growth 2018-2023

Table 49 - Off-trade Sales of Carbonates by Category: Volume 2018-2023

Table 50 - Off-trade Sales of Carbonates by Category: Value 2018-2023

Table 51 - Off-trade Sales of Carbonates by Category: % Volume Growth 2018-2023

Table 52 - Off-trade Sales of Carbonates by Category: % Value Growth 2018-2023

Table 53 - Sales of Carbonates by Total Fountain On-trade: Volume 2018-2023

Table 54 - Sales of Carbonates by Total Fountain On-trade: % Volume Growth 2018-2023

Table 55 - NBO Company Shares of Off-trade Carbonates: % Volume 2019-2023

Table 56 - LBN Brand Shares of Off-trade Carbonates: % Volume 2020-2023

Table 57 - NBO Company Shares of Off-trade Carbonates: % Value 2019-2023

Table 58 - LBN Brand Shares of Off-trade Carbonates: % Value 2020-2023

Table 59 - Forecast Off-trade Sales of Carbonates by Category: Volume 2023-2028

Table 60 - Forecast Off-trade Sales of Carbonates by Category: Value 2023-2028

Table 61 - Forecast Off-trade Sales of Carbonates by Category: % Volume Growth 2023-2028

Table 62 - Forecast Off-trade Sales of Carbonates by Category: % Value Growth 2023-2028

Table 63 - Forecast Sales of Carbonates by Total Fountain On-trade: Volume 2023-2028

Table 64 - Forecast Sales of Carbonates by Total Fountain On-trade: % Volume Growth 2023-2028

Concentrates in Estonia

KEY DATA FINDINGS

2023 DEVELOPMENTS

Powder concentrates leverages convenience and versatility

Liquid concentrates offer more affordable alternatives to ready-to-drink beverages

Local production holds sway

PROSPECTS AND OPPORTUNITIES

Powder concentrates to continue to enjoy growing consumer demand

Application of liquid concentrates in the preparation of cocktails can boost the category

Seasonality affects the sales of concentrates

CATEGORY DATA

Concentrates Conversions

Summary 2 - Concentrates Conversion Factors for Ready-to-Drink (RTD) Format

Table 65 - Off-trade Sales of Concentrates (RTD) by Category: Volume 2018-2023

Table 66 - Off-trade Sales of Concentrates by Category: Value 2018-2023

Table 67 - Off-trade Sales of Concentrates (RTD) by Category: % Volume Growth 2018-2023

Table 68 - Off-trade Sales of Concentrates by Category: % Value Growth 2018-2023

Table 69 - NBO Company Shares of Off-trade Concentrates (RTD): % Volume 2019-2023

Table 70 - LBN Brand Shares of Off-trade Concentrates (RTD): % Volume 2020-2023

Table 71 - NBO Company Shares of Off-trade Concentrates: % Value 2019-2023

Table 72 - LBN Brand Shares of Off-trade Concentrates: % Value 2020-2023

Table 73 - NBO Company Shares of Off-trade Liquid Concentrates (RTD): % Volume 2019-2023

Table 74 - LBN Brand Shares of Off-trade Liquid Concentrates (RTD): % Volume 2020-2023

Table 75 - NBO Company Shares of Off-trade Powder Concentrates (RTD): % Volume 2019-2023

Table 76 - LBN Brand Shares of Off-trade Powder Concentrates (RTD): % Volume 2020-2023

Table 77 - Forecast Off-trade Sales of Concentrates (RTD) by Category: Volume 2023-2028

Table 78 - Forecast Off-trade Sales of Concentrates by Category: Value 2023-2028

Table 79 - Forecast Off-trade Sales of Concentrates (RTD) by Category: % Volume Growth 2023-2028

Table 80 - Forecast Off-trade Sales of Concentrates by Category: % Value Growth 2023-2028

Juice in Estonia

KEY DATA FINDINGS

2023 DEVELOPMENTS

Rising consumer health awareness boosts coconut and other plant waters

Health and wellness spurs not from concentrate 100% juice

A Le Coq leverages strong reputation and investment to lead juice

PROSPECTS AND OPPORTUNITIES

The demand for coconut and other plant waters is set to continue to grow in the forecast period

Not from concentrate 100% juice to ride the search for more natural packaged juice

Reconstituted 100% juice to remain popular in retail and foodservice

CATEGORY DATA

- Table 81 - Off-trade Sales of Juice by Category: Volume 2018-2023
- Table 82 - Off-trade Sales of Juice by Category: Value 2018-2023
- Table 83 - Off-trade Sales of Juice by Category: % Volume Growth 2018-2023
- Table 84 - Off-trade Sales of Juice by Category: % Value Growth 2018-2023
- Table 85 - NBO Company Shares of Off-trade Juice: % Volume 2019-2023
- Table 86 - LBN Brand Shares of Off-trade Juice: % Volume 2020-2023
- Table 87 - NBO Company Shares of Off-trade Juice: % Value 2019-2023
- Table 88 - LBN Brand Shares of Off-trade Juice: % Value 2020-2023
- Table 89 - Forecast Off-trade Sales of Juice by Category: Volume 2023-2028
- Table 90 - Forecast Off-trade Sales of Juice by Category: Value 2023-2028
- Table 91 - Forecast Off-trade Sales of Juice by Category: % Volume Growth 2023-2028
- Table 92 - Forecast Off-trade Sales of Juice by Category: % Value Growth 2023-2028

RTD Tea in Estonia

KEY DATA FINDINGS

2023 DEVELOPMENTS

- Reduced sugar still RTD tea continues to gain traction in Estonia
- RTD tea is seen as a convenient and refreshing option in foodservice
- Coca-Cola HBC Eesti introduces fruit-flavoured options to tempt consumers

PROSPECTS AND OPPORTUNITIES

- RTD tea to continue to see a shift to reduced sugar still RTD tea
- The demand for regular still RTD tea is expected to fall amid a shift away from sugarised beverages
- Convenience stores and retail e-commerce are likely to exert pressure on large modern grocery retailers

CATEGORY DATA

- Table 93 - Off-trade Sales of RTD Tea by Category: Volume 2018-2023
- Table 94 - Off-trade Sales of RTD Tea by Category: Value 2018-2023
- Table 95 - Off-trade Sales of RTD Tea by Category: % Volume Growth 2018-2023
- Table 96 - Off-trade Sales of RTD Tea by Category: % Value Growth 2018-2023
- Table 97 - NBO Company Shares of Off-trade RTD Tea: % Volume 2019-2023
- Table 98 - LBN Brand Shares of Off-trade RTD Tea: % Volume 2020-2023
- Table 99 - NBO Company Shares of Off-trade RTD Tea: % Value 2019-2023
- Table 100 - LBN Brand Shares of Off-trade RTD Tea: % Value 2020-2023
- Table 101 - Forecast Off-trade Sales of RTD Tea by Category: Volume 2023-2028
- Table 102 - Forecast Off-trade Sales of RTD Tea by Category: Value 2023-2028
- Table 103 - Forecast Off-trade Sales of RTD Tea by Category: % Volume Growth 2023-2028
- Table 104 - Forecast Off-trade Sales of RTD Tea by Category: % Value Growth 2023-2028

Energy Drinks in Estonia

KEY DATA FINDINGS

2023 DEVELOPMENTS

- Energy drinks in higher demand
- Target audience of energy drinks expands
- Red Bull leverages strong marketing and high consumer recognition to lead

PROSPECTS AND OPPORTUNITIES

- The demand for energy drinks is expected to continue to grow
- A new line-up of energy drinks is anticipated in the forecast period
- Energy drinks to remain popular in foodservice

CATEGORY DATA

Table 105 - Off-trade Sales of Energy Drinks: Volume 2018-2023

Table 106 - Off-trade Sales of Energy Drinks: Value 2018-2023

Table 107 - Off-trade Sales of Energy Drinks: % Volume Growth 2018-2023

Table 108 - Off-trade Sales of Energy Drinks: % Value Growth 2018-2023

Table 109 - NBO Company Shares of Off-trade Energy Drinks: % Volume 2019-2023

Table 110 - LBN Brand Shares of Off-trade Energy Drinks: % Volume 2020-2023

Table 111 - NBO Company Shares of Off-trade Energy Drinks: % Value 2019-2023

Table 112 - LBN Brand Shares of Off-trade Energy Drinks: % Value 2020-2023

Table 113 - Forecast Off-trade Sales of Energy Drinks: Volume 2023-2028

Table 114 - Forecast Off-trade Sales of Energy Drinks: Value 2023-2028

Table 115 - Forecast Off-trade Sales of Energy Drinks: % Volume Growth 2023-2028

Table 116 - Forecast Off-trade Sales of Energy Drinks: % Value Growth 2023-2028

Sports Drinks in Estonia

KEY DATA FINDINGS

2023 DEVELOPMENTS

Rising number of active consumers grows the demand for sports drinks in Estonia

Sports and fitness lifestyles underpin the consumer base for sports drinks

A Le Coq leverages innovation to drive the category

PROSPECTS AND OPPORTUNITIES

Sports drinks to surf sports and fitness waves

Marketing campaigns to push athletic and high-energy attributes

Significant increases in demand despite competition

CATEGORY DATA

Table 117 - Off-trade Sales of Sports Drinks: Volume 2018-2023

Table 118 - Off-trade Sales of Sports Drinks: Value 2018-2023

Table 119 - Off-trade Sales of Sports Drinks: % Volume Growth 2018-2023

Table 120 - Off-trade Sales of Sports Drinks: % Value Growth 2018-2023

Table 121 - NBO Company Shares of Off-trade Sports Drinks: % Volume 2019-2023

Table 122 - LBN Brand Shares of Off-trade Sports Drinks: % Volume 2020-2023

Table 123 - NBO Company Shares of Off-trade Sports Drinks: % Value 2019-2023

Table 124 - LBN Brand Shares of Off-trade Sports Drinks: % Value 2020-2023

Table 125 - Forecast Off-trade Sales of Sports Drinks: Volume 2023-2028

Table 126 - Forecast Off-trade Sales of Sports Drinks: Value 2023-2028

Table 127 - Forecast Off-trade Sales of Sports Drinks: % Volume Growth 2023-2028

Table 128 - Forecast Off-trade Sales of Sports Drinks: % Value Growth 2023-2028

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/soft-drinks-in-estonia/report.