



Passport

Soft Drinks in Estonia

Euromonitor International

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SOFT DRINKS IN ESTONIA - INDUSTRY OVERVIEW

EXECUTIVE SUMMARY

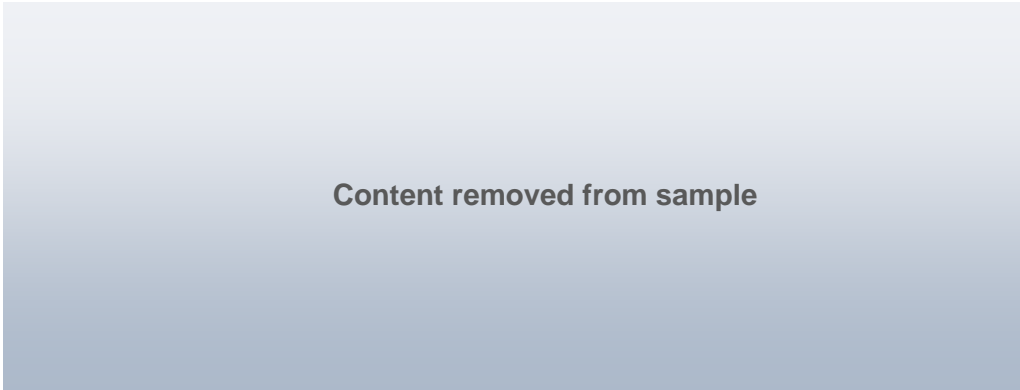
COVID-19 impact on soft drinks

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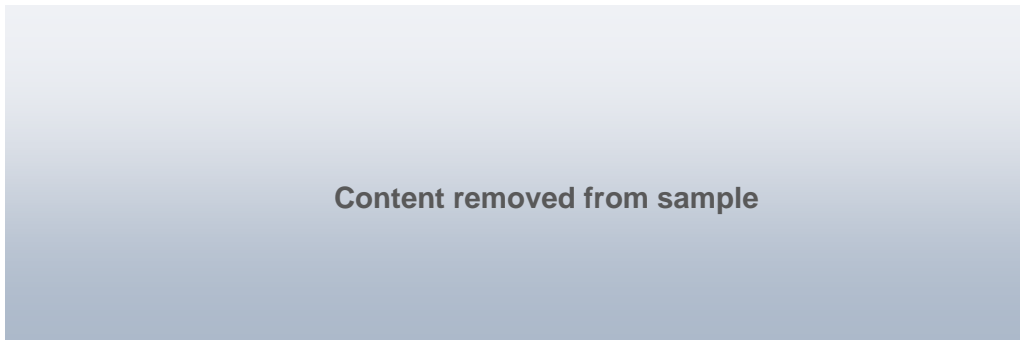
COVID-19 country impact

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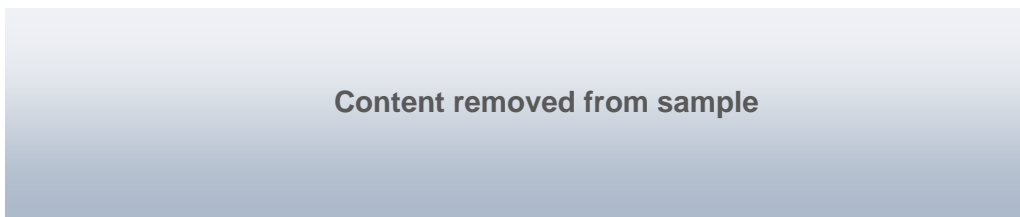
Company response



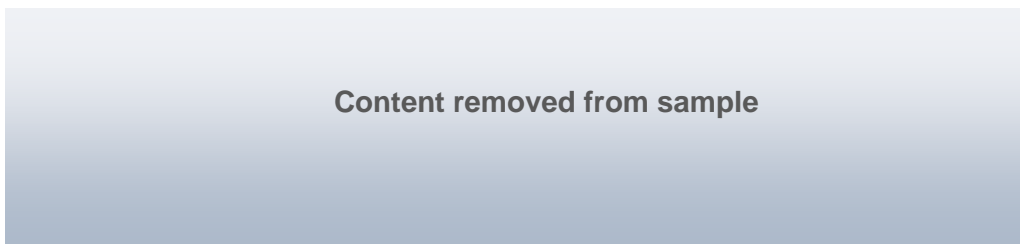
Retailing shift



Foodservice vs retail split



What next for soft drinks?



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MARKET DATA

Table 1 Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: Volume 2015-2020

million litres

	2015	2016	2017	2018	2019	2020
Off-trade	Data removed from sample					
On-trade						
Total						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 2 Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: % Volume Growth 2015-2020

% volume growth

	2019/20	2015-20 CAGR	2015/20 Total
Off-trade	Data removed from sample		
On-trade			
Total			

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 3 Off-trade vs On-trade Sales of Soft Drinks by Channel: Value 2015-2020

EUR million

	2015	2016	2017	2018	2019	2020
Off-trade	Data removed from sample					
On-trade						
Total						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 4 Off-trade vs On-trade Sales of Soft Drinks by Channel: % Value Growth 2015-2020

% constant value growth

	2019/20	2015-20 CAGR	2015/20 Total
	Data removed from sample		

Off-trade
On-trade
Total

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 5 Off-trade vs On-trade Sales of Soft Drinks (as sold) by Category: Volume 2019

million litres

Off-trade On-trade Total

Bottled Water
Carbonates
Concentrates
Juice
RTD Coffee
RTD Tea
Energy Drinks
Sports Drinks
Asian Speciality Drinks
Soft Drinks

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Note: Excludes powder concentrates

Table 6 Off-trade vs On-trade Sales of Soft Drinks (as sold) by Category: % Volume 2019

% volume analysis

Off-trade On-trade Total

Bottled Water
Carbonates
Concentrates
Juice
RTD Coffee
RTD Tea
Energy Drinks
Sports Drinks
Asian Speciality Drinks
Soft Drinks

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Note: Excludes powder concentrates

Table 7 Off-trade vs On-trade Sales of Soft Drinks by Category: Value 2019

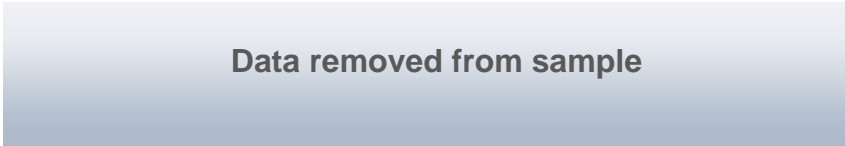
EUR million

Off-trade On-trade Total

Bottled Water
Carbonates
Concentrates
Juice
RTD Coffee

Data removed from sample

RTD Tea
 Energy Drinks
 Sports Drinks
 Asian Speciality Drinks
 Soft Drinks



Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 8 Off-trade vs On-trade Sales of Soft Drinks by Category: % Value 2019

% value analysis

	Off-trade	On-trade	Total
Bottled Water	Data removed from sample		
Carbonates			
Concentrates			
Juice			
RTD Coffee			
RTD Tea			
Energy Drinks			
Sports Drinks			
Asian Speciality Drinks			
Soft Drinks			

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 9 Off-trade Sales of Soft Drinks (RTD) by Category: Volume 2015-2020

million litres

	2015	2016	2017	2018	2019	2020
Bottled Water	Data removed from sample					
Carbonates						
Concentrates						
Juice						
RTD Coffee						
RTD Tea						
Energy Drinks						
Sports Drinks						
Asian Speciality Drinks						
Soft Drinks						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 10 Off-trade Sales of Soft Drinks (RTD) by Category: % Volume Growth 2015-2020

% volume growth

	2019/20	2015-20 CAGR	2015/20 Total
Bottled Water	Data removed from sample		
Carbonates			
Concentrates			
Juice			
RTD Coffee			
RTD Tea			

Energy Drinks
Sports Drinks
Asian Speciality Drinks
Soft Drinks

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 11 Off-trade Sales of Soft Drinks by Category: Value 2015-2020

EUR million

	2015	2016	2017	2018	2019	2020
Bottled Water	Data removed from sample					
Carbonates						
Concentrates						
Juice						
RTD Coffee						
RTD Tea						
Energy Drinks						
Sports Drinks						
Asian Speciality Drinks						
Soft Drinks						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 12 Off-trade Sales of Soft Drinks by Category: % Value Growth 2015-2020

% current value growth

	2019/20	2015-20 CAGR	2015/20 Total
Bottled Water	Data removed from sample		
Carbonates			
Concentrates			
Juice			
RTD Coffee			
RTD Tea			
Energy Drinks			
Sports Drinks			
Asian Speciality Drinks			
Soft Drinks			

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 13 Sales of Soft Drinks by Total Fountain On-trade: Volume 2015-2020

million litres

	2015	2016	2017	2018	2019	2020
Total Fountain On-trade	Data removed from sample					

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 14 Sales of Soft Drinks by Total Fountain On-trade: % Volume Growth 2015-2020

% fountain volume growth

2019/20 2015-20 CAGR 2015/20 Total

Total Fountain On-trade

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 15 NBO Company Shares of Off-trade Soft Drinks (RTD): % Volume 2016-2020

% off-trade volume
Company

2016 2017 2018 2019 2020

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 16 LBN Brand Shares of Off-trade Soft Drinks (RTD): % Volume 2017-2020

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 17 NBO Company Shares of Off-trade Soft Drinks: % Value 2016-2020

% off-trade value rsp Company	2016	2017	2018	2019	2020
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Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 18 LBN Brand Shares of Off-trade Soft Drinks: % Value 2017-2020

% off-trade value rsp Brand (GBO)	Company (NBO)	2017	2018	2019	2020
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Data removed from sample

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 19 Penetration of Private Label in Off-trade Soft Drinks (RTD) by Category: % Volume 2015-2020

% retail rtd volume	2015	2016	2017	2018	2019	2020
Bottled Water	Data removed from sample					
Carbonates						
Concentrates						
Juice						
RTD Tea						
Soft Drinks						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 20 Penetration of Private Label in Off-trade Soft Drinks by Category: % Value 2015-2020

% retail value rsp	2015	2016	2017	2018	2019	2020
Bottled Water	Data removed from sample					
Carbonates						
Concentrates						
Juice						
RTD Tea						
Soft Drinks						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 21 Distribution of Off-trade Soft Drinks (as sold) by Format: % Volume 2015-2020

% off-trade	2015	2016	2017	2018	2019	2020
Store-Based Retailing	Data removed from sample					
- Grocery Retailers						
-- Modern Grocery Retailers						
--- Convenience Stores						
--- Discounters						
--- Forecourt Retailers						
--- Hypermarkets						
--- Supermarkets						
-- Traditional Grocery Retailers						
--- Food/drink/tobacco specialists						
--- Independent Small Grocers						
--- Other Grocery Retailers						
- Mixed Retailers						
- Non-Grocery Specialists						
Non-Store Retailing						
- Vending						
- Homeshopping						

- E-Commerce
- Direct Selling
- Total

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 22 Distribution of Off-trade Soft Drinks (as sold) by Format and Category: % Volume 2020

% off-trade

	BW	CB	CN	JU	RTDC	RTDT
Store-Based Retailing	Data removed from sample					
- Grocery Retailers						
-- Modern Grocery Retailers						
--- Convenience Stores						
--- Discounters						
--- Forecourt Retailers						
--- Hypermarkets						
--- Supermarkets						
-- Traditional Grocery Retailers						
--- Food/drink/tobacco specialists						
--- Independent Small Grocers						
--- Other Grocery Retailers						
- Mixed Retailers						
- Non-Grocery Specialists						
Non-Store Retailing						
- Vending						
- Homeshopping						
- E-Commerce						
- Direct Selling						
Total						

	ED	SPD	ASD
Store-Based Retailing	Data removed from sample		
- Grocery Retailers			
-- Modern Grocery Retailers			
--- Convenience Stores			
--- Discounters			
--- Forecourt Retailers			
--- Hypermarkets			
--- Supermarkets			
-- Traditional Grocery Retailers			
--- Food/drink/tobacco specialists			
--- Independent Small Grocers			
--- Other Grocery Retailers			
- Mixed Retailers			
- Non-Grocery Specialists			

Non-Store Retailing
 - Vending
 - Homeshopping
 - E-Commerce
 - Direct Selling
 Total

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Key: BW = bottled water; CB = carbonates; CN = concentrates; JU = juice; RTDC = RTD coffee; RTDT = RTD tea; ED = energy drinks; SPD = sports drinks; ASD = Asian speciality drinks

Note: Excludes powder concentrates

Table 23 Forecast Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: Volume 2020-2025

million litres

2020 2021 2022 2023 2024 2025

Off-trade
 On-trade
 Total

Data removed from sample

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 24 Forecast Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: % Volume Growth 2020-2025

% volume growth

2020/21 2020-25 CAGR 2020/25 Total

Off-trade
 On-trade
 Total

Data removed from sample

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 25 Forecast Off-trade vs On-trade Sales of Soft Drinks by Channel: Value 2020-2025

EUR million

2020 2021 2022 2023 2024 2025

Off-trade
 On-trade
 Total

Data removed from sample

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 26 Forecast Off-trade vs On-trade Sales of Soft Drinks by Channel: % Value Growth 2020-2025

% constant value growth

2020/21 2020-25 CAGR 2020/25 Total

Off-trade
On-trade
Total

Data removed from sample

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 27 Forecast Off-trade Sales of Soft Drinks (RTD) by Category: Volume 2020-2025

million litres

	2020	2021	2022	2023	2024	2025
Bottled Water	Data removed from sample					
Carbonates						
Concentrates						
Juice						
RTD Coffee						
RTD Tea						
Energy Drinks						
Sports Drinks						
Asian Speciality Drinks						
Soft Drinks						

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 28 Forecast Off-trade Sales of Soft Drinks (RTD) by Category: % Volume Growth 2020-2025

% volume growth

	2020/21	2020-25 CAGR	2020/25 Total
Bottled Water	Data removed from sample		
Carbonates			
Concentrates			
Juice			
RTD Coffee			
RTD Tea			
Energy Drinks			
Sports Drinks			
Asian Speciality Drinks			
Soft Drinks			

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 29 Forecast Off-trade Sales of Soft Drinks by Category: Value 2020-2025

EUR million

	2020	2021	2022	2023	2024	2025
Bottled Water	Data removed from sample					
Carbonates						
Concentrates						
Juice						
RTD Coffee						
RTD Tea						
Energy Drinks						

Sports Drinks
Asian Speciality Drinks
Soft Drinks

Data removed from sample

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 30 Forecast Off-trade Sales of Soft Drinks by Category: % Value Growth 2020-2025

% constant value growth

	2020/2021	2020-25 CAGR	2020/25 Total
Bottled Water	Data removed from sample		
Carbonates			
Concentrates			
Juice			
RTD Coffee			
RTD Tea			
Energy Drinks			
Sports Drinks			
Asian Speciality Drinks			
Soft Drinks			

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 31 Forecast Sales of Soft Drinks by Total Fountain On-trade: Volume 2020-2025

million litres

	2020	2021	2022	2023	2024	2025
Total Fountain On-trade	Data removed from sample					

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 32 Forecast Sales of Soft Drinks by Total Fountain On-trade: % Volume Growth 2020-2025

% fountain volume growth

	2020/21	2020-25 CAGR	2020/25 Total
Total Fountain On-trade	Data removed from sample		

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

GLOBAL MACROECONOMIC ENVIRONMENT

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GLOBAL INDUSTRY ENVIRONMENT

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DISCLAIMER

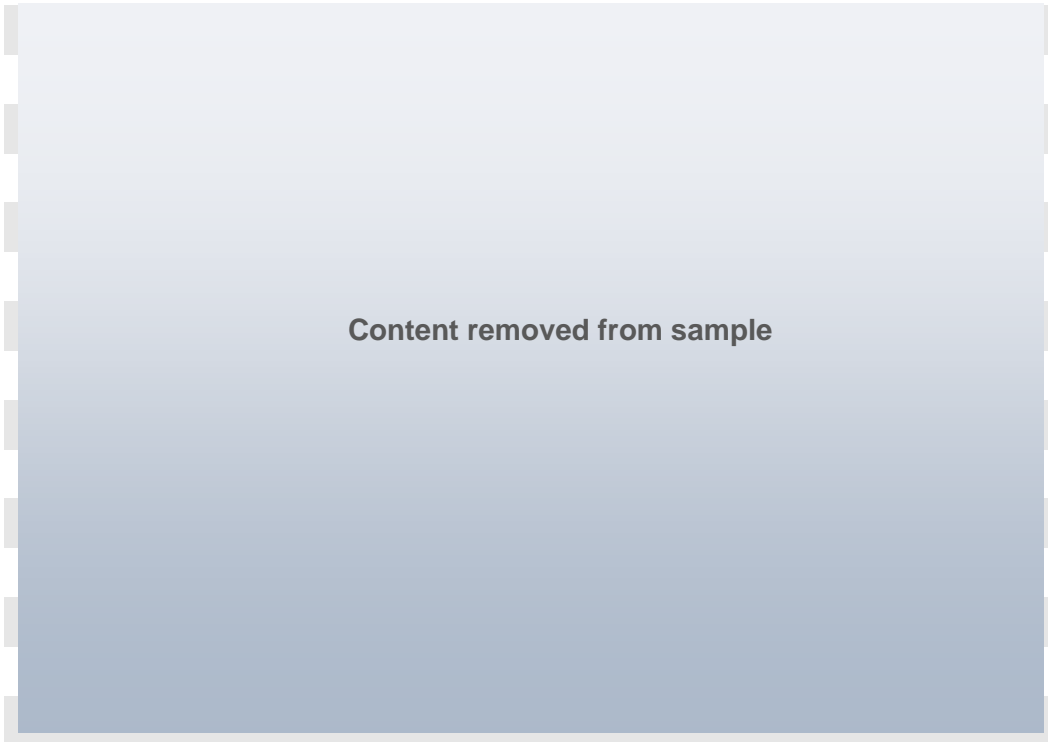
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SOURCES

Sources used during the research included the following:

Summary 1 Research Sources

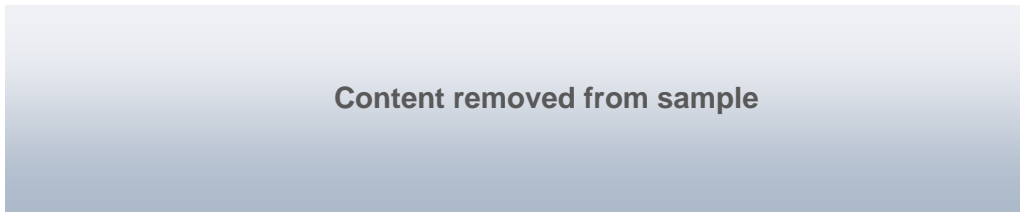
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Source: Euromonitor International

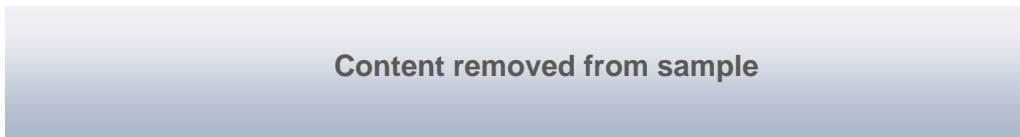
BOTTLED WATER IN ESTONIA - CATEGORY ANALYSIS

KEY DATA FINDINGS

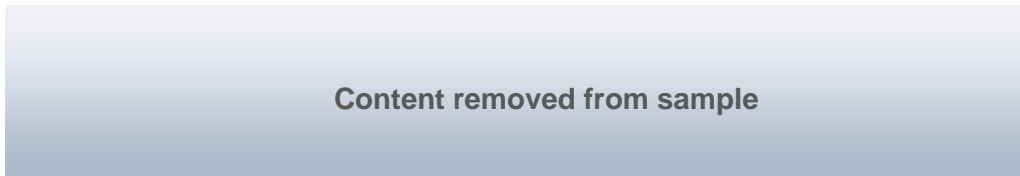


2020 IMPACT

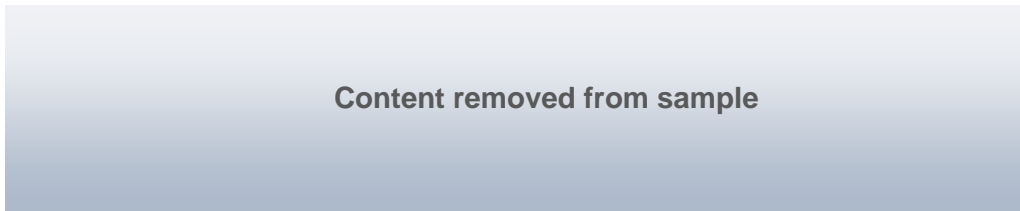
On-trade and sports facility closures lead to an overall decline in bottled water in 2020



Functional bottled water performs well as it taps into the growing health and wellness trend

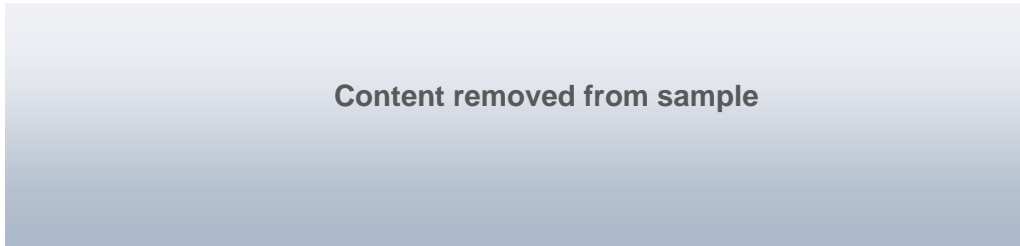


Carbonated bottled water players gain ground in 2020, despite overall decline of category

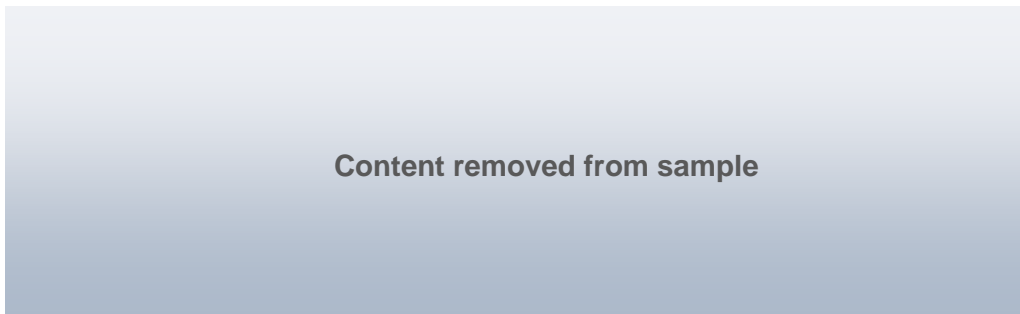


RECOVERY AND OPPORTUNITIES

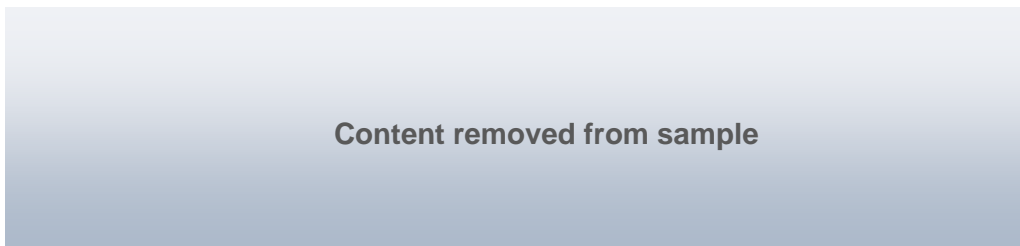
Innovation will be seen in packaging as well as products as new players enter the scene



On-trade recovery will give bottled water A boost in 2021, but retail growth will remain modest



Innovation in functional bottled water will drive sales across the forecast period



CATEGORY DATA

Table 33 Off-trade Sales of Bottled Water by Category: Volume 2015-2020

million litres

	2015	2016	2017	2018	2019	2020
Carbonated Bottled Water	Data removed from sample					
Flavoured Bottled Water						
Functional Bottled Water						
Still Bottled Water						
Bottled Water						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 34 Off-trade Sales of Bottled Water by Category: Value 2015-2020

EUR million

	2015	2016	2017	2018	2019	2020
Carbonated Bottled Water	Data removed from sample					
Flavoured Bottled Water						
Functional Bottled Water						
Still Bottled Water						
Bottled Water						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 35 Off-trade Sales of Bottled Water by Category: % Volume Growth 2015-2020

% volume growth

	2019/20	2015-20 CAGR	2015/20 Total
Carbonated Bottled Water	Data removed from sample		
Flavoured Bottled Water			
Functional Bottled Water			
Still Bottled Water			
Bottled Water			

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 36 Off-trade Sales of Bottled Water by Category: % Value Growth 2015-2020

% current value growth

	2019/20	2015-20 CAGR	2015/20 Total
Carbonated Bottled Water	Data removed from sample		
Flavoured Bottled Water			
Functional Bottled Water			
Still Bottled Water			
Bottled Water			

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 37 NBO Company Shares of Off-trade Bottled Water: % Volume 2016-2020

% off-trade volume

Company	2016	2017	2018	2019	2020
	Data removed from sample				

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 38 LBN Brand Shares of Off-trade Bottled Water: % Volume 2017-2020

% off-trade volume Brand (GBO)	Company (NBO)	2017	2018	2019	2020
-----------------------------------	---------------	------	------	------	------

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 39 NBO Company Shares of Off-trade Bottled Water: % Value 2016-2020

% off-trade value rsp Company	2016	2017	2018	2019	2020
----------------------------------	------	------	------	------	------

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 40 LBN Brand Shares of Off-trade Bottled Water: % Value 2017-2020

% off-trade value rsp Brand (GBO)	Company (NBO)	2017	2018	2019	2020
--------------------------------------	---------------	------	------	------	------

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 41 Forecast Off-trade Sales of Bottled Water by Category: Volume 2020-2025

million litres

	2020	2021	2022	2023	2024	2025
Carbonated Bottled Water	Data removed from sample					
Flavoured Bottled Water						
Functional Bottled Water						
Still Bottled Water						
Bottled Water						

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 42 Forecast Off-trade Sales of Bottled Water by Category: Value 2020-2025

EUR million

	2020	2021	2022	2023	2024	2025
Carbonated Bottled Water	Data removed from sample					
Flavoured Bottled Water						
Functional Bottled Water						
Still Bottled Water						
Bottled Water						

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 43 Forecast Off-trade Sales of Bottled Water by Category: % Volume Growth 2020-2025

% volume growth

	2020/21	2020-25 CAGR	2020/25 Total
Carbonated Bottled Water	Data removed from sample		
Flavoured Bottled Water			
Functional Bottled Water			
Still Bottled Water			
Bottled Water			

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 44 Forecast Off-trade Sales of Bottled Water by Category: % Value Growth 2020-2025

% constant value growth

	2020/2021	2020-25 CAGR	2020/25 Total
Carbonated Bottled Water	Data removed from sample		
Flavoured Bottled Water			
Functional Bottled Water			
Still Bottled Water			
Bottled Water			

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

CARBONATES IN ESTONIA - CATEGORY ANALYSIS

KEY DATA FINDINGS

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2020 IMPACT

Increase in off-trade sales mitigates steep decline in on-trade sales, but carbonates face competition from healthier soft drinks

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Coca-Cola continues to dominate thanks to its ubiquitous presence in Estonia and well-established distribution networks

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Smaller players capitalise on demand for local, natural ingredients, while tonic water gets A boost from off-trade closures

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RECOVERY AND OPPORTUNITIES

Carbonates will see A bounce in on-trade sales in 2021, but faces long-term competition from healthier soft drinks

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Low-sugar and natural carbonates will become more prevalent, while tonic water offers scope for growth

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E-commerce sales will continue to grow as Estonians shop from the comfort of their own homes

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CATEGORY DATA

Table 45 Off-trade vs On-trade Sales of Carbonates: Volume 2015-2020

million litres

	2015	2016	2017	2018	2019	2020
Off-trade	Data removed from sample					
On-trade						
Total						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 46 Off-trade vs On-trade Sales of Carbonates: Value 2015-2020

EUR million

	2015	2016	2017	2018	2019	2020
Off-trade	Data removed from sample					
On-trade						
Total						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 47 Off-trade vs On-trade Sales of Carbonates: % Volume Growth 2015-2020

% volume growth

	2019/20	2015-20 CAGR	2015/20 Total
Off-trade	Data removed from sample		
On-trade			
Total			

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 48 Off-trade vs On-trade Sales of Carbonates: % Value Growth 2015-2020

% constant value growth

	2019/20	2015-20 CAGR	2015/20 Total
Off-trade	Data removed from sample		
On-trade			
Total			

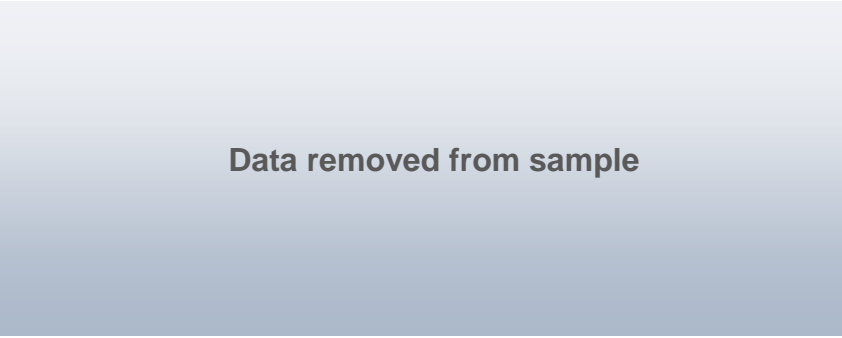
Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 49 Off-trade Sales of Carbonates by Category: Volume 2015-2020

million litres

	2015	2016	2017	2018	2019	2020
Cola Carbonates	Data removed from sample					

- Low Calorie Cola Carbonates
- Regular Cola Carbonates
- Non-Cola Carbonates
- Lemonade/Lime
- Ginger Ale
- Tonic Water/Other Bitters
- Orange Carbonates
- Other Non-Cola Carbonates



Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 50 Off-trade Sales of Carbonates by Category: Value 2015-2020

EUR million

	2015	2016	2017	2018	2019	2020
Cola Carbonates	Data removed from sample					
- Low Calorie Cola Carbonates						
- Regular Cola Carbonates						
Non-Cola Carbonates						
- Lemonade/Lime						
- Ginger Ale						
- Tonic Water/Other Bitters						
- Orange Carbonates						
- Other Non-Cola Carbonates						
Carbonates						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 51 Off-trade Sales of Carbonates by Category: % Volume Growth 2015-2020

% volume growth

	2019/20	2015-20 CAGR	2015/20 Total
Cola Carbonates	Data removed from sample		
- Low Calorie Cola Carbonates			
- Regular Cola Carbonates			
Non-Cola Carbonates			
- Lemonade/Lime			
- Ginger Ale			
- Tonic Water/Other Bitters			
- Orange Carbonates			
- Other Non-Cola Carbonates			
Carbonates			

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 52 Off-trade Sales of Carbonates by Category: % Value Growth 2015-2020

% current value growth

	2019/20	2015-20 CAGR	2015/20 Total
Cola Carbonates	Data removed from sample		
- Low Calorie Cola Carbonates			
- Regular Cola Carbonates			
Non-Cola Carbonates			
- Lemonade/Lime			
- Ginger Ale			
- Tonic Water/Other Bitters			
- Orange Carbonates			
- Other Non-Cola Carbonates			
Carbonates			

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 53 Sales of Carbonates by Total Fountain On-trade: Volume 2015-2020

million litres

	2015	2016	2017	2018	2019	2020
Total Fountain On-trade	Data removed from sample					

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 54 Sales of Carbonates by Total Fountain On-trade: % Volume Growth 2015-2020

% fountain volume growth

	2019/20	2015-20 CAGR	2015/20 Total
Total Fountain On-trade	Data removed from sample		

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 55 NBO Company Shares of Off-trade Carbonates: % Volume 2016-2020

% off-trade volume

Company	2016	2017	2018	2019	2020
Data removed from sample					

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 56 LBN Brand Shares of Off-trade Carbonates: % Volume 2017-2020

% off-trade volume Brand (GBO)	Company (NBO)	2017	2018	2019	2020
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Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 57 NBO Company Shares of Off-trade Carbonates: % Value 2016-2020

% off-trade value rsp Company	2016	2017	2018	2019	2020
----------------------------------	------	------	------	------	------

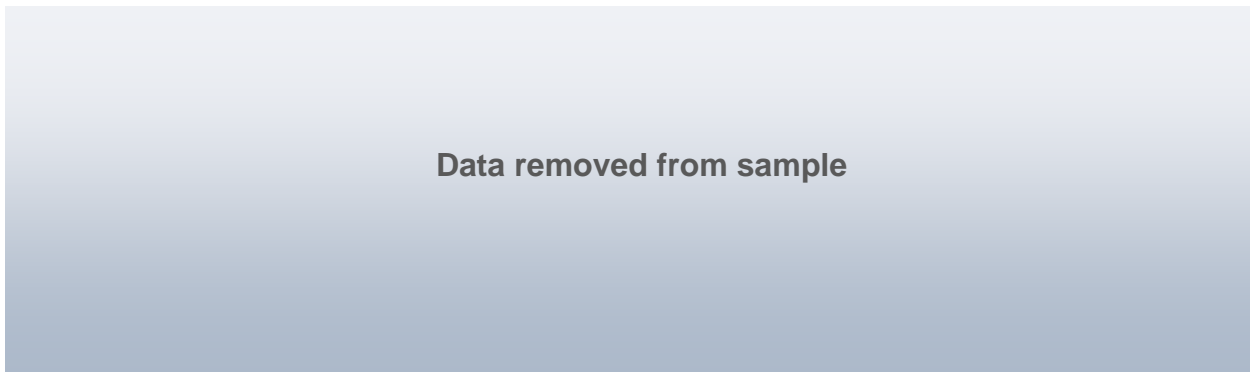
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Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 58 LBN Brand Shares of Off-trade Carbonates: % Value 2017-2020

% off-trade value rsp Brand (GBO)	Company (NBO)	2017	2018	2019	2020
--------------------------------------	---------------	------	------	------	------

Data removed from sample



Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 59 Forecast Off-trade Sales of Carbonates by Category: Volume 2020-2025

million litres

	2020	2021	2022	2023	2024	2025
Cola Carbonates	Data removed from sample					
- Low Calorie Cola Carbonates						
- Regular Cola Carbonates						
Non-Cola Carbonates						
- Lemonade/Lime						
- Ginger Ale						
- Tonic Water/Other Bitters						
- Orange Carbonates						
- Other Non-Cola Carbonates						
Carbonates						

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 60 Forecast Off-trade Sales of Carbonates by Category: Value 2020-2025

EUR million

	2020	2021	2022	2023	2024	2025
Cola Carbonates	Data removed from sample					
- Low Calorie Cola Carbonates						
- Regular Cola Carbonates						
Non-Cola Carbonates						
- Lemonade/Lime						
- Ginger Ale						
- Tonic Water/Other Bitters						
- Orange Carbonates						
- Other Non-Cola						

Carbonates
Carbonates

Data removed from sample

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 61 Forecast Off-trade Sales of Carbonates by Category: % Volume Growth 2020-2025

% volume growth

2020/21 2020-25 CAGR 2020/25 Total

Cola Carbonates
- Low Calorie Cola Carbonates
- Regular Cola Carbonates
Non-Cola Carbonates
- Lemonade/Lime
- Ginger Ale
- Tonic Water/Other Bitters
- Orange Carbonates
- Other Non-Cola Carbonates
Carbonates

Data removed from sample

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 62 Forecast Off-trade Sales of Carbonates by Category: % Value Growth 2020-2025

% constant value growth

2020/2021 2020-25 CAGR 2020/25 Total

Cola Carbonates
- Low Calorie Cola Carbonates
- Regular Cola Carbonates
Non-Cola Carbonates
- Lemonade/Lime
- Ginger Ale
- Tonic Water/Other Bitters
- Orange Carbonates
- Other Non-Cola Carbonates
Carbonates

Data removed from sample

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 63 Forecast Sales of Carbonates by Total Fountain On-trade: Volume 2020-2025

million litres

2020 2021 2022 2023 2024 2025

Total Fountain On-trade

Data removed from sample

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 64 Forecast Sales of Carbonates by Total Fountain On-trade: % Volume Growth
2020-2025

% fountain volume growth

2020/21

2020-25 CAGR

2020/25 Total

Total Fountain On-trade

Data removed from sample

Source: Euromonitor International from trade associations, trade press, company research, trade interviews,
trade sources

CONCENTRATES IN ESTONIA - CATEGORY ANALYSIS

KEY DATA FINDINGS

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2020 IMPACT

Concentrates sees some volume and current value growth thanks to greater at-home consumption during lockdown

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Health and wellness and convenience trends limit growth in 2020

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Strong local positioning ensures Orkla Eesti remains in pole position as Rongu Mahlads plays catch up

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RECOVERY AND OPPORTUNITIES

Powder concentrates faces stiff competition from other soft drinks, but liquid concentrates may get A boost from new Ikea opening

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Gloomy outlook for concentrates as unhealthy profile stifles innovation and growth

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New product developments within powder concentrates may enable smaller players to grab share

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CATEGORY DATA

Concentrates Conversions

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

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Source: Euromonitor International

Table 65 Off-trade Sales of Concentrates (RTD) by Category: Volume 2015-2020

'000 litres

	2015	2016	2017	2018	2019	2020
Liquid Concentrates	Data removed from sample					
Powder Concentrates						
Concentrates						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 66 Off-trade Sales of Concentrates by Category: Value 2015-2020

EUR '000

	2015	2016	2017	2018	2019	2020
Liquid Concentrates	Data removed from sample					
Powder Concentrates						
Concentrates						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 67 Off-trade Sales of Concentrates (RTD) by Category: % Volume Growth 2015-2020

% volume growth

	2019/20	2015-20 CAGR	2015/20 Total
Liquid Concentrates	Data removed from sample		
Powder Concentrates			
Concentrates			

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 68 Off-trade Sales of Concentrates by Category: % Value Growth 2015-2020

% current value growth

	2019/20	2015-20 CAGR	2015/20 Total
Liquid Concentrates	Data removed from sample		
Powder Concentrates			
Concentrates			

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 69 NBO Company Shares of Off-trade Concentrates (RTD): % Volume 2016-2020

% off-trade volume Company	2016	2017	2018	2019	2020
-------------------------------	------	------	------	------	------

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 70 LBN Brand Shares of Off-trade Concentrates (RTD): % Volume 2017-2020

% off-trade volume Brand (GBO)	Company (NBO)	2017	2018	2019	2020
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Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 71 Forecast Off-trade Sales of Concentrates (RTD) by Category: Volume 2020-2025

'000 litres	2020	2021	2022	2023	2024	2025
Liquid Concentrates Powder Concentrates Concentrates	Data removed from sample					

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 72 Forecast Off-trade Sales of Concentrates by Category: Value 2020-2025

EUR '000	2020	2021	2022	2023	2024	2025
Liquid Concentrates Powder Concentrates Concentrates	Data removed from sample					

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 73 NBO Company Shares of Off-trade Concentrates: % Value 2016-2020

% off-trade value rsp Company	2016	2017	2018	2019	2020
Data removed from sample					

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 74 LBN Brand Shares of Off-trade Concentrates: % Value 2017-2020

% off-trade value rsp Brand (GBO)	Company (NBO)	2017	2018	2019	2020
Data removed from sample					

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 75 NBO Company Shares of Off-trade Liquid Concentrates (RTD): % Volume 2016-2020

% off-trade volume Company	2016	2017	2018	2019	2020
-------------------------------	------	------	------	------	------

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 76 LBN Brand Shares of Off-trade Liquid Concentrates (RTD): % Volume 2017-2020

% off-trade volume Brand (GBO)	Company (NBO)	2017	2018	2019	2020
-----------------------------------	---------------	------	------	------	------

Data removed from sample

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 77 NBO Company Shares of Off-trade Powder Concentrates (RTD): % Volume 2016-2020

% off-trade volume Company	2016	2017	2018	2019	2020
-------------------------------	------	------	------	------	------

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 78 LBN Brand Shares of Off-trade Powder Concentrates (RTD): % Volume 2017-2020

% off-trade volume Brand (GBO)	Company (NBO)	2017	2018	2019	2020
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Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 79 Forecast Off-trade Sales of Concentrates (RTD) by Category: Volume 2020-2025

million litres	2020	2021	2022	2023	2024	2025
----------------	------	------	------	------	------	------

Liquid Concentrates
Powder Concentrates
Concentrates

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 80 Forecast Off-trade Sales of Concentrates by Category: Value 2020-2025

EUR million

2020 2021 2022 2023 2024 2025

Liquid Concentrates
Powder Concentrates
Concentrates

Data removed from sample

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 81 Forecast Off-trade Sales of Concentrates (RTD) by Category: % Volume Growth 2020-2025

% volume growth

2020/21 2020-25 CAGR 2020/25 Total

Liquid Concentrates
Powder Concentrates
Concentrates

Data removed from sample

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 82 Forecast Off-trade Sales of Concentrates by Category: % Value Growth 2020-2025

% constant value growth

2020/2021 2020-25 CAGR 2020/25 Total

Liquid Concentrates
Powder Concentrates
Concentrates

Data removed from sample

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

JUICE IN ESTONIA - CATEGORY ANALYSIS

KEY DATA FINDINGS

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2020 IMPACT

Deepening health and wellness trend negatively impacting juice sales in 2020

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Strong brand awareness and fresher image supports local players

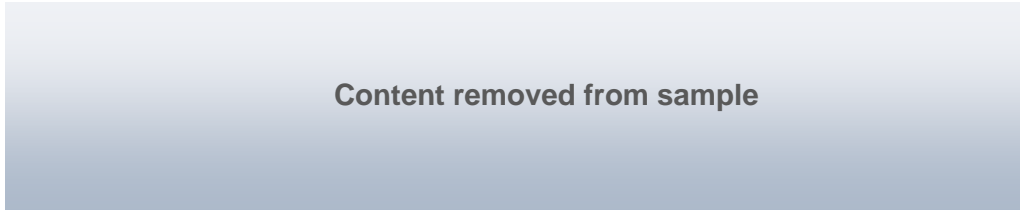
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Channel shifts in 2020 benefit e-commerce and other grocery retailers

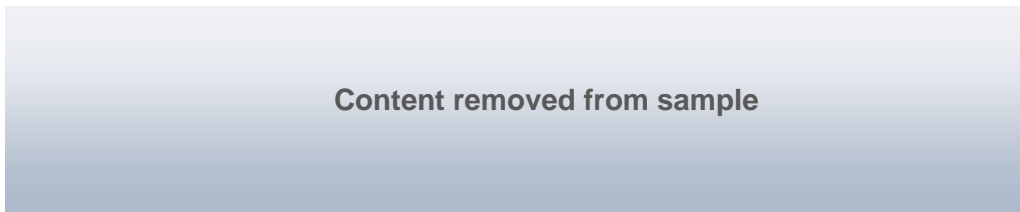
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RECOVERY AND OPPORTUNITIES

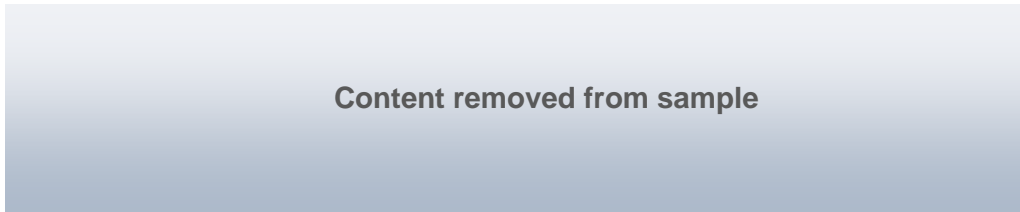
Shift to healthier alternatives will benefit not from concentrate juice and coconut and other plant waters



Some recovery in 2021 will help juice record growth over the forecast period, but challenges remain



Domestic producers expected to adapt to developing trends with new product development



CATEGORY DATA

Table 83 Off-trade Sales of Juice by Category: Volume 2015-2020

million litres

	2015	2016	2017	2018	2019	2020
100% Juice	Data removed from sample					
- Not from Concentrate						
100% Juice						
- Reconstituted 100%						
Juice						
Juice Drinks (up to 24%						
Juice)						
Nectars						
Coconut and Other Plant						
Waters						

Juice

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 84 Off-trade Sales of Juice by Category: Value 2015-2020

EUR million

	2015	2016	2017	2018	2019	2020
100% Juice	Data removed from sample					
- Not from Concentrate 100% Juice						
- Reconstituted 100% Juice						
Juice Drinks (up to 24% Juice)						
Nectars						
Coconut and Other Plant Waters						
Juice						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 85 Off-trade Sales of Juice by Category: % Volume Growth 2015-2020

% volume growth

	2019/20	2015-20 CAGR	2015/20 Total
100% Juice	Data removed from sample		
- Not from Concentrate 100% Juice			
- Reconstituted 100% Juice			
Juice Drinks (up to 24% Juice)			
Nectars			
Coconut and Other Plant Waters			
Juice			

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 86 Off-trade Sales of Juice by Category: % Value Growth 2015-2020

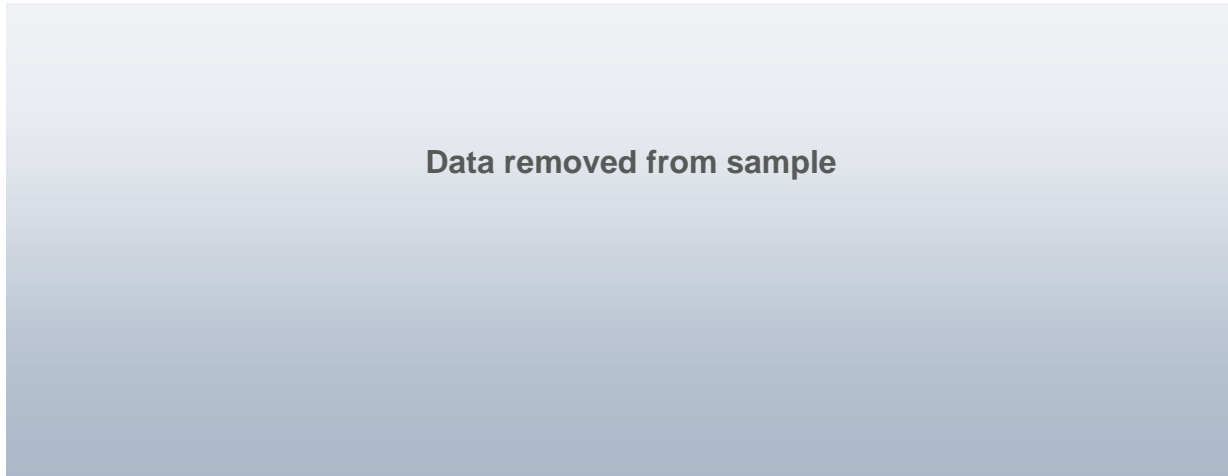
% current value growth

	2019/20	2015-20 CAGR	2015/20 Total
100% Juice	Data removed from sample		
- Not from Concentrate 100% Juice			
- Reconstituted 100% Juice			
Juice Drinks (up to 24% Juice)			
Nectars			
Coconut and Other Plant Waters			
Juice			

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 87 NBO Company Shares of Off-trade Juice: % Volume 2016-2020

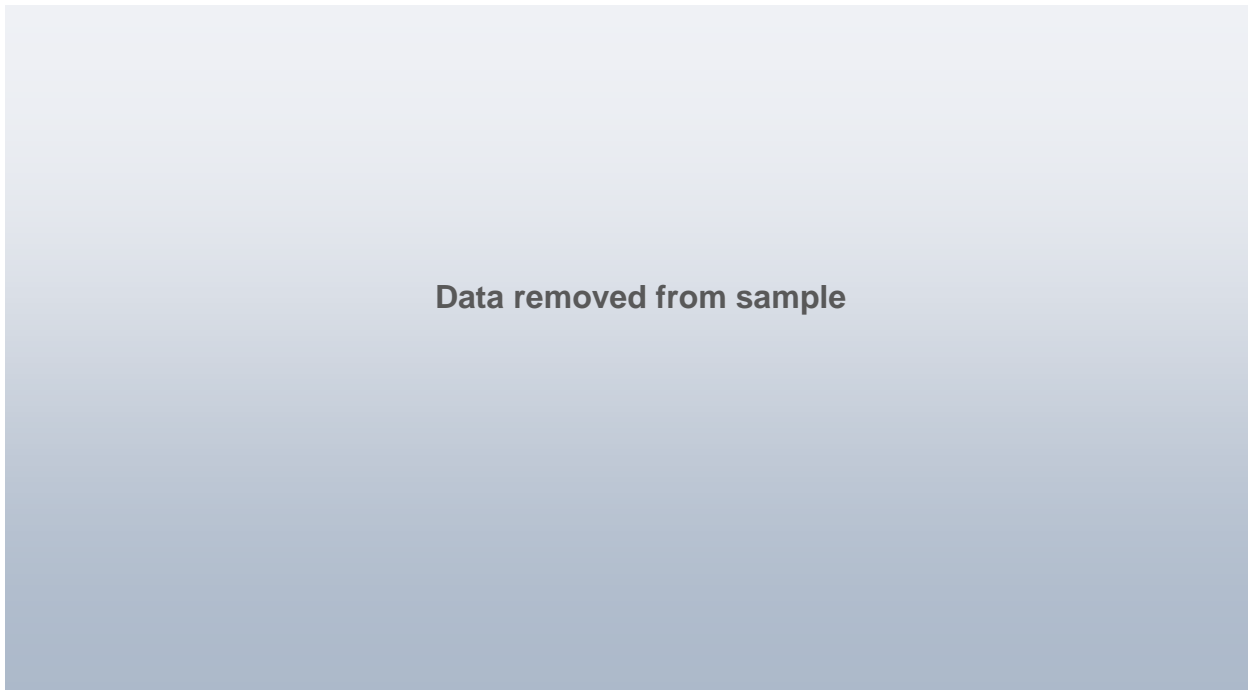
% off-trade volume Company	2016	2017	2018	2019	2020
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Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 88 LBN Brand Shares of Off-trade Juice: % Volume 2017-2020

% off-trade volume Brand (GBO)	Company (NBO)	2017	2018	2019	2020
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Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 89 NBO Company Shares of Off-trade Juice: % Value 2016-2020

% off-trade value rsp Company	2016	2017	2018	2019	2020
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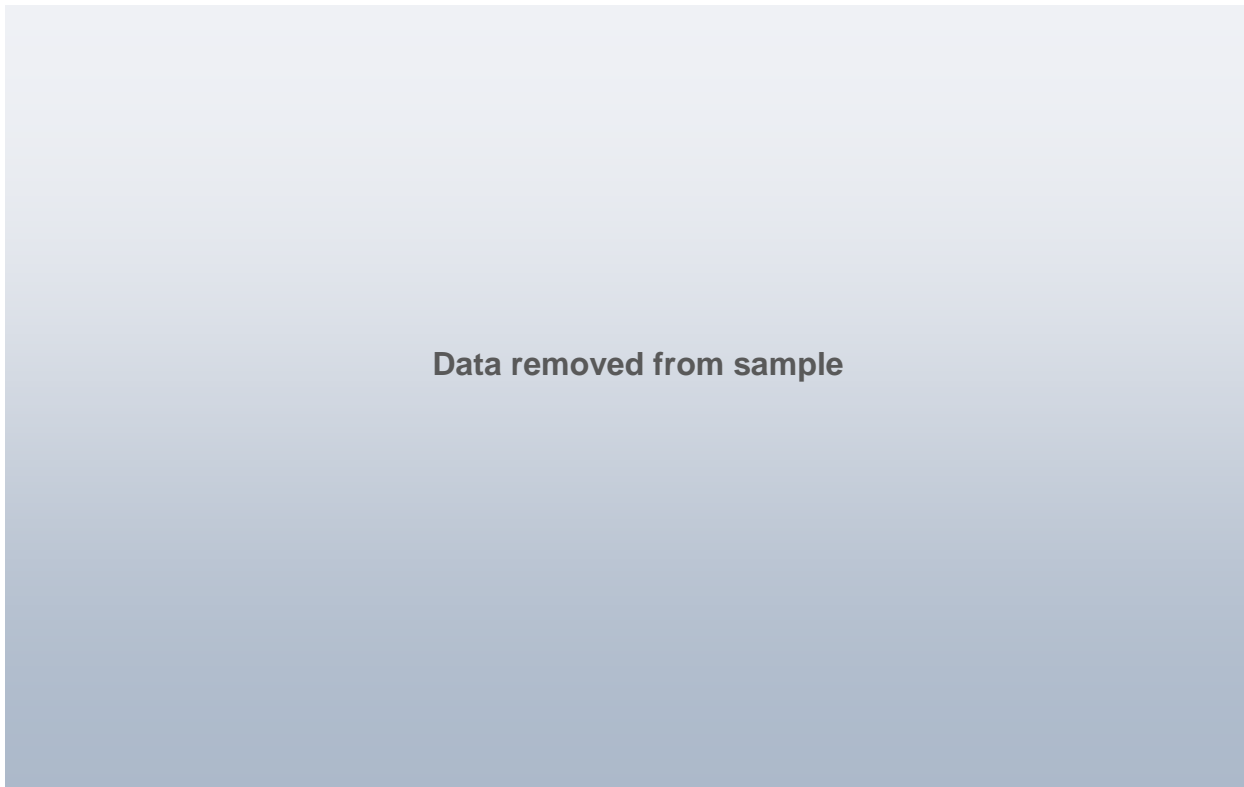
Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 90 LBN Brand Shares of Off-trade Juice: % Value 2017-2020

% off-trade value rsp Brand (GBO)	Company (NBO)	2017	2018	2019	2020
--------------------------------------	---------------	------	------	------	------

Data removed from sample



Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 91 Forecast Off-trade Sales of Juice by Category: Volume 2020-2025

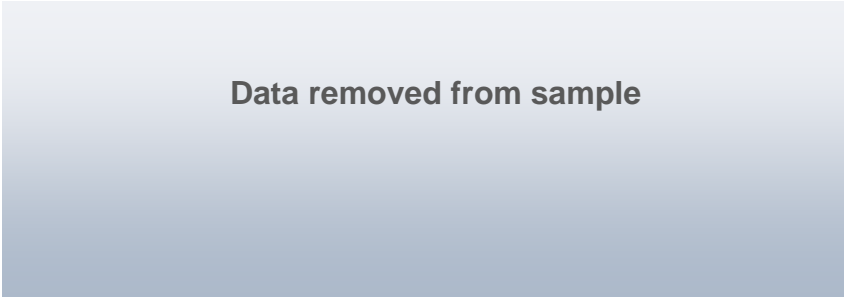
million litres	2020	2021	2022	2023	2024	2025
100% Juice	Data removed from sample					
- Not from Concentrate						
100% Juice						
- Reconstituted 100%						
Juice						
Juice Drinks (up to 24%						
Juice)						
Nectars						
Coconut and Other Plant						
Waters						
Juice						

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 92 Forecast Off-trade Sales of Juice by Category: Value 2020-2025

EUR million	2020	2021	2022	2023	2024	2025
-------------	------	------	------	------	------	------

100% Juice
 - Not from Concentrate 100% Juice
 - Reconstituted 100% Juice
 Juice Drinks (up to 24% Juice)
 Nectars
 Coconut and Other Plant Waters
 Juice



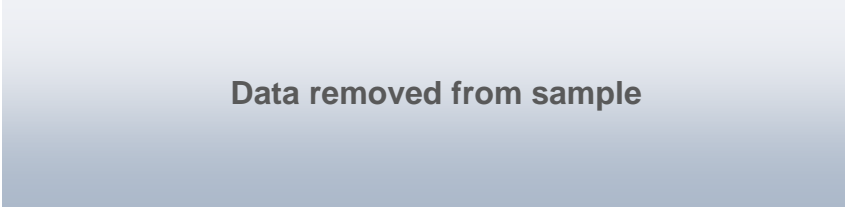
Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 93 Forecast Off-trade Sales of Juice by Category: % Volume Growth 2020-2025

% volume growth

2020/21 2020-25 CAGR 2020/25 Total

100% Juice
 - Not from Concentrate 100% Juice
 - Reconstituted 100% Juice
 Juice Drinks (up to 24% Juice)
 Nectars
 Coconut and Other Plant Waters
 Juice



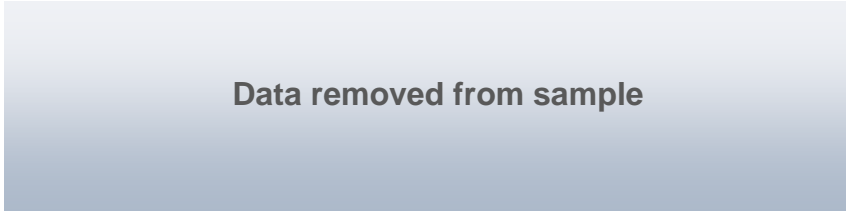
Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 94 Forecast Off-trade Sales of Juice by Category: % Value Growth 2020-2025

% constant value growth

2020/2021 2020-25 CAGR 2020/25 Total

100% Juice
 - Not from Concentrate 100% Juice
 - Reconstituted 100% Juice
 Juice Drinks (up to 24% Juice)
 Nectars
 Coconut and Other Plant Waters
 Juice



Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

RTD COFFEE IN ESTONIA - CATEGORY ANALYSIS

KEY DATA FINDINGS

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2020 IMPACT

Rising demand for convenience fuelling interest among consumers

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New product developments fuel dynamic growth within RTD coffee

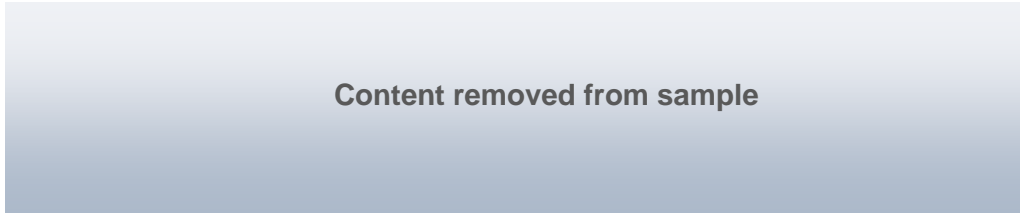
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Paulig Coffee Estonia takes the lead in off-trade value terms in 2020

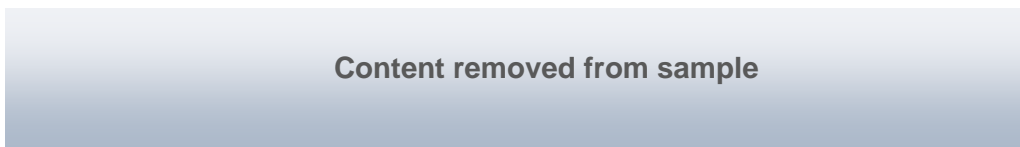
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RECOVERY AND OPPORTUNITIES

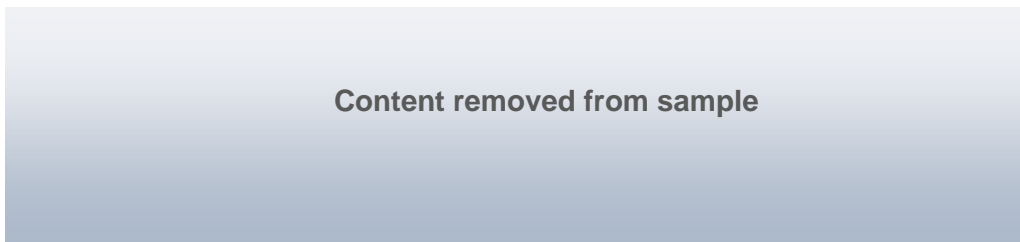
Prospects for on-trade sales remain bleak unless awareness rises



Increasingly hot summers bode well for sales of RTD coffee in the future



Improved positioning across more retail channels offers RTD coffee scope for growth



CATEGORY DATA

Table 95 Off-trade Sales of RTD Coffee: Volume 2015-2020

'000 litres

	2015	2016	2017	2018	2019	2020
RTD Coffee	Data removed from sample					

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 96 Off-trade Sales of RTD Coffee: Value 2015-2020

EUR '000

	2015	2016	2017	2018	2019	2020
RTD Coffee	Data removed from sample					

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 97 Off-trade Sales of RTD Coffee: % Volume Growth 2015-2020

% volume growth

	2019/20	2015-20 CAGR	2015/20 Total
RTD Coffee	Data removed from sample		

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 98 Off-trade Sales of RTD Coffee: % Value Growth 2015-2020

% current value growth

	2019/20	2015-20 CAGR	2015/20 Total
RTD Coffee	Data removed from sample		

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 99 NBO Company Shares of Off-trade RTD Coffee: % Volume 2016-2020

% off-trade volume
Company

2016	2017	2018	2019	2020
Data removed from sample				

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 100 LBN Brand Shares of Off-trade RTD Coffee: % Volume 2017-2020

% off-trade volume
Brand (GBO)

Company (NBO)	2017	2018	2019	2020
Data removed from sample				

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 101 NBO Company Shares of Off-trade RTD Coffee: % Value 2016-2020

% off-trade value rsp Company	2016	2017	2018	2019	2020
----------------------------------	------	------	------	------	------

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 102 LBN Brand Shares of Off-trade RTD Coffee: % Value 2017-2020

% off-trade value rsp Brand (GBO)	Company (NBO)	2017	2018	2019	2020
--------------------------------------	---------------	------	------	------	------

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 103 Forecast Off-trade Sales of RTD Coffee: Volume 2020-2025

'000 litres	2020	2021	2022	2023	2024	2025
RTD Coffee	Data removed from sample					

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 104 Forecast Off-trade Sales of RTD Coffee: Value 2020-2025

EUR '000

2020 2021 2022 2023 2024 2025

RTD Coffee

Data removed from sample

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 105 Forecast Off-trade Sales of RTD Coffee: % Volume Growth 2020-2025

% volume growth

2020/21 2020-25 CAGR 2020/25 Total

RTD Coffee

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 106 Forecast Off-trade Sales of RTD Coffee: % Value Growth 2020-2025

% constant value growth

2020/2021 2020-25 CAGR 2020/25 Total

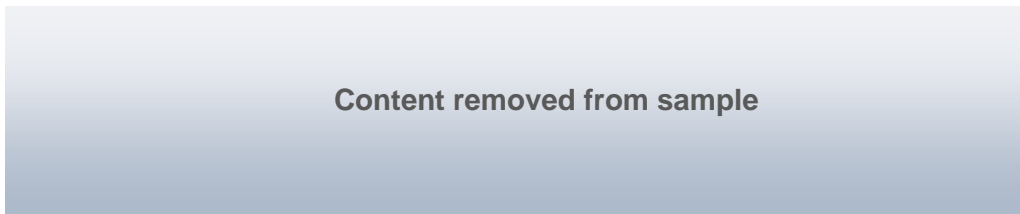
RTD Coffee

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

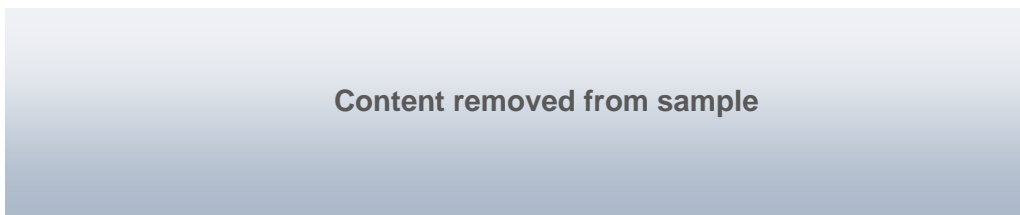
RTD TEA IN ESTONIA - CATEGORY ANALYSIS

KEY DATA FINDINGS

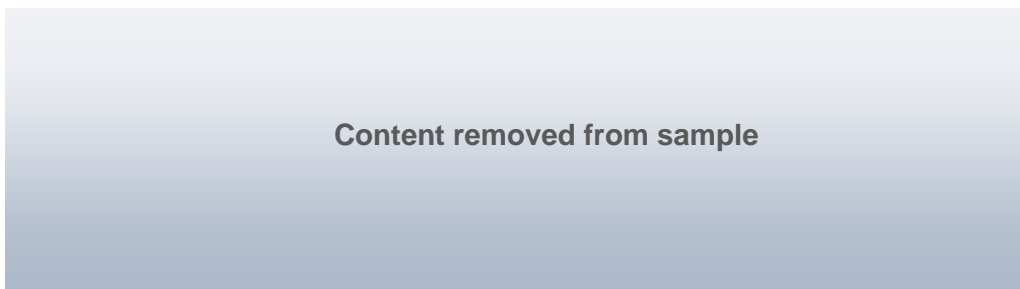


2020 IMPACT

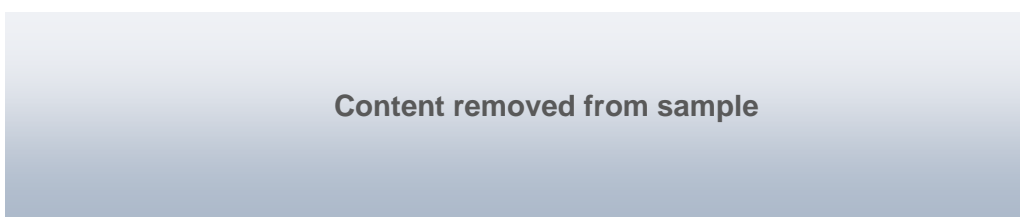
RTD tea remains niche in Estonia and struggles to weather the storm in 2020



Fuze Tea dominates in A category targeting younger consumers



Premiumisation on hold in 2020 as consumer purchasing power weakens



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RECOVERY AND OPPORTUNITIES

Potential implementation of sugar tax threatens retail sales, but resumption of on-trade sales will boost growth

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Weak product selection to continue limiting sales in an arena dominated by Fuze Tea

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Health and wellness trend to impact new product development in RTD tea in the future

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CATEGORY DATA

Table 107 Off-trade Sales of RTD Tea by Category: Volume 2015-2020

million litres

	2015	2016	2017	2018	2019	2020
Carbonated RTD Tea and Kombucha Still RTD Tea	Data removed from sample					

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 112 LBN Brand Shares of Off-trade RTD Tea: % Volume 2017-2020

% off-trade volume Brand (GBO)	Company (NBO)	2017	2018	2019	2020
-----------------------------------	---------------	------	------	------	------

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 113 NBO Company Shares of Off-trade RTD Tea: % Value 2016-2020

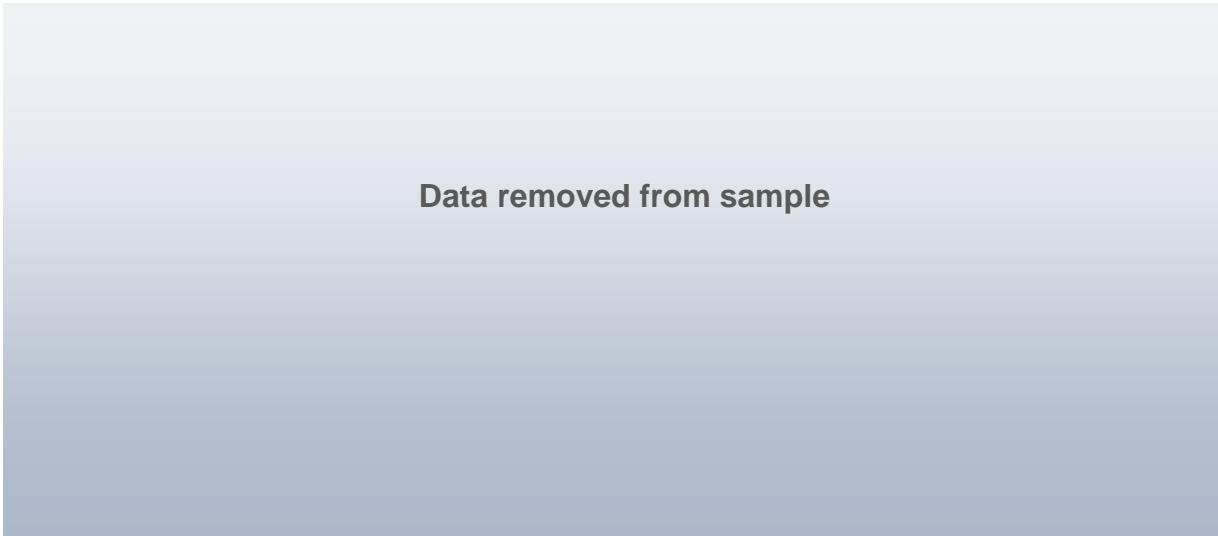
% off-trade value rsp Company	2016	2017	2018	2019	2020
----------------------------------	------	------	------	------	------

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 114 LBN Brand Shares of Off-trade RTD Tea: % Value 2017-2020

% off-trade value rsp Brand (GBO)	Company (NBO)	2017	2018	2019	2020
--------------------------------------	---------------	------	------	------	------



Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 115 Forecast Off-trade Sales of RTD Tea by Category: Volume 2020-2025

million litres	2020	2021	2022	2023	2024	2025
Carbonated RTD Tea and Kombucha Still RTD Tea RTD Tea	Data removed from sample					

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 116 Forecast Off-trade Sales of RTD Tea by Category: Value 2020-2025

EUR million	2020	2021	2022	2023	2024	2025
Carbonated RTD Tea and Kombucha Still RTD Tea RTD Tea	Data removed from sample					

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 117 Forecast Off-trade Sales of RTD Tea by Category: % Volume Growth 2020-2025

% volume growth	2020/21	2020-25 CAGR	2020/25 Total
Carbonated RTD Tea and Kombucha	Data removed from sample		

Still RTD Tea
RTD Tea

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 118 Forecast Off-trade Sales of RTD Tea by Category: % Value Growth 2020-2025

% constant value growth

2020/2021 2020-25 CAGR 2020/25 Total

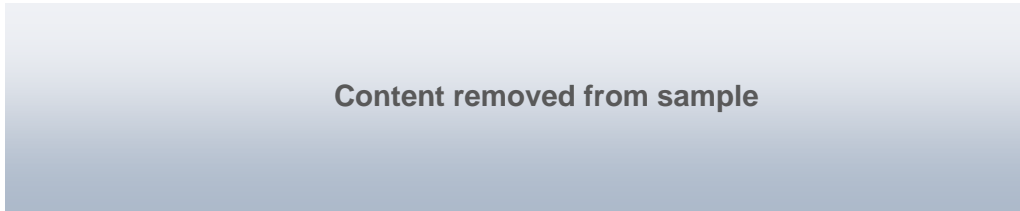
Carbonated RTD Tea and Kombucha
Still RTD Tea
RTD Tea

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

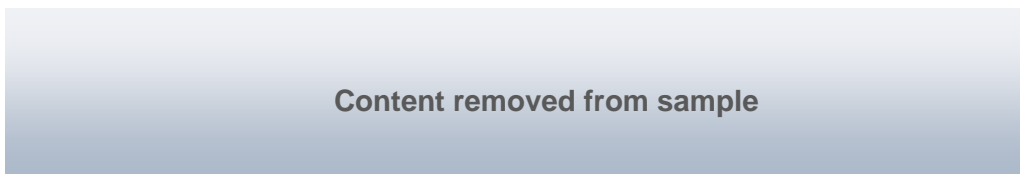
ENERGY DRINKS IN ESTONIA - CATEGORY ANALYSIS

KEY DATA FINDINGS

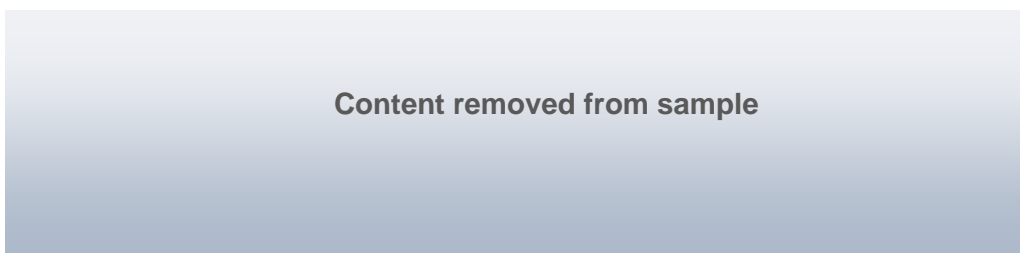


2020 IMPACT

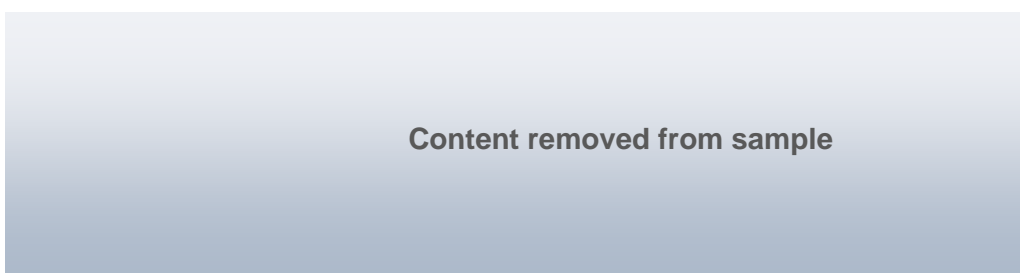
Energy drinks gets A boost in 2020, as popularity among younger consumers grows



Coca-Cola and Red Bull steal the limelight thanks to global recognition and heavy investment in promotional activities

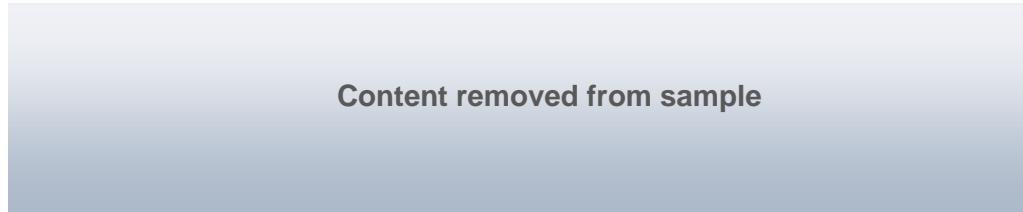


Leading players invest in new products to attract consumers

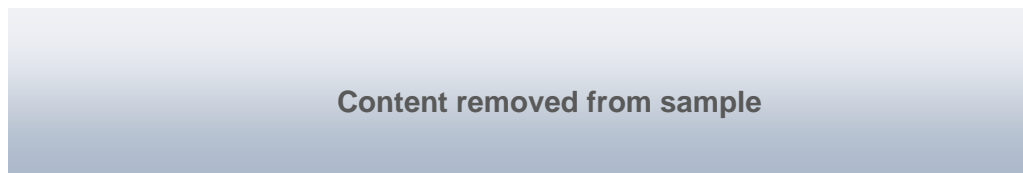


RECOVERY AND OPPORTUNITIES

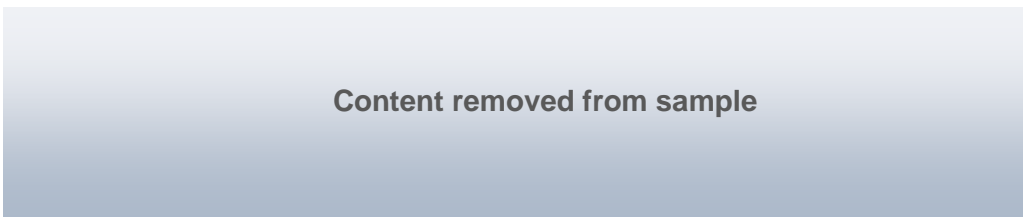
Energy drinks will get A boost when on-trade outlets reopen, but unhealthy image poses A serious challenge



Energy drinks continue to be heavily promoted to younger people



Scope for local players to meet demand for healthier energy drinks



CATEGORY DATA

Table 119 Off-trade Sales of Energy Drinks: Volume 2015-2020

million litres

	2015	2016	2017	2018	2019	2020
Energy Drinks	Data removed from sample					

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 120 Off-trade Sales of Energy Drinks: Value 2015-2020

EUR million

	2015	2016	2017	2018	2019	2020
Energy Drinks	Data removed from sample					

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 121 Off-trade Sales of Energy Drinks: % Volume Growth 2015-2020

% volume growth

2019/20 2015-20 CAGR 2015/20 Total

Energy Drinks

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 122 Off-trade Sales of Energy Drinks: % Value Growth 2015-2020

% current value growth

2019/20 2015-20 CAGR 2015/20 Total

Energy Drinks

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 123 NBO Company Shares of Off-trade Energy Drinks: % Volume 2016-2020

% off-trade volume

Company

2016

2017

2018

2019

2020

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 124 LBN Brand Shares of Off-trade Energy Drinks: % Volume 2017-2020

% off-trade volume

Brand (GBO)

Company (NBO)

2017

2018

2019

2020

Data removed from sample

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 125 NBO Company Shares of Off-trade Energy Drinks: % Value 2016-2020

% off-trade value rsp Company	2016	2017	2018	2019	2020
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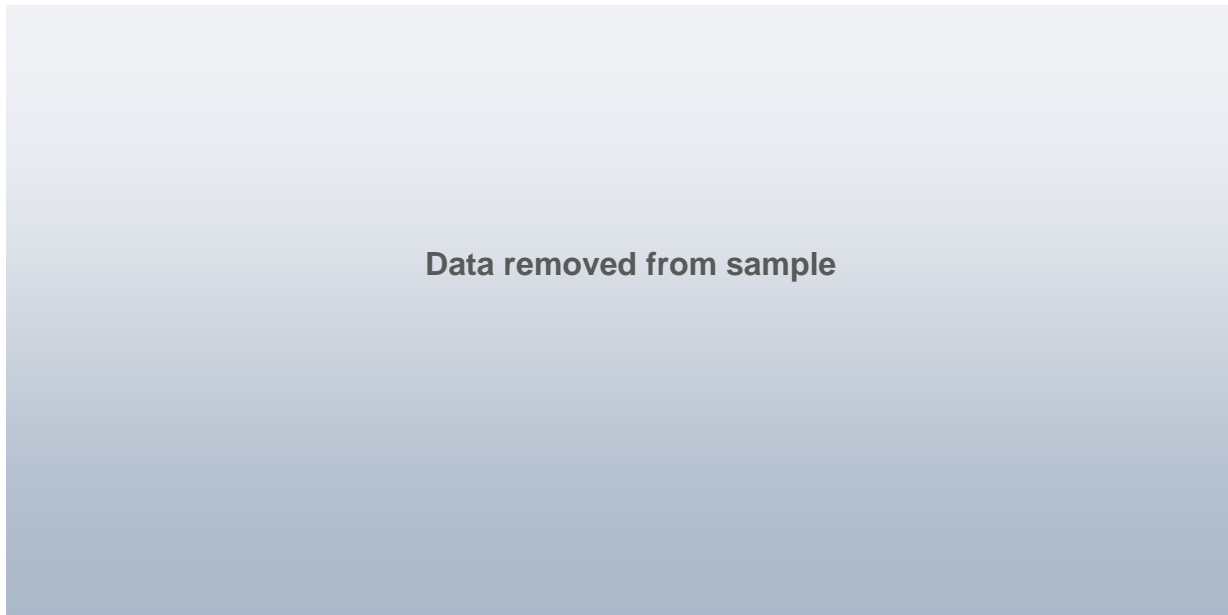
Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 126 LBN Brand Shares of Off-trade Energy Drinks: % Value 2017-2020

% off-trade value rsp

Brand (GBO) Company (NBO) 2017 2018 2019 2020



Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 127 Forecast Off-trade Sales of Energy Drinks: Volume 2020-2025

million litres

	2020	2021	2022	2023	2024	2025
Energy Drinks	Data removed from sample					

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 128 Forecast Off-trade Sales of Energy Drinks: Value 2020-2025

EUR million

	2020	2021	2022	2023	2024	2025
Energy Drinks	Data removed from sample					

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 129 Forecast Off-trade Sales of Energy Drinks: % Volume Growth 2020-2025

% volume growth

	2020/21	2020-25 CAGR	2020/25 Total
Energy Drinks	Data removed from sample		

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 130 Forecast Off-trade Sales of Energy Drinks: % Value Growth 2020-2025

% constant value growth

	2020/2021	2020-25 CAGR	2020/25 Total
Energy Drinks	Data removed from sample		

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

SPORTS DRINKS IN ESTONIA - CATEGORY ANALYSIS

KEY DATA FINDINGS

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2020 IMPACT

Closure of sports facilities and lockdown hits sports drinks hard in 2020

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Local origins and strong promotion help ensure A Le Coq's continued dominance

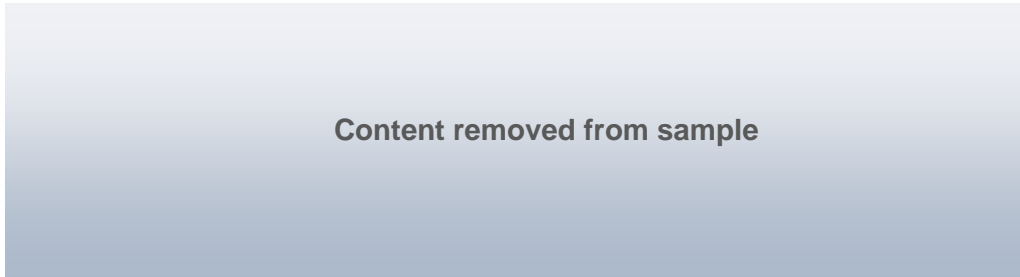
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Shifts in consumer behaviour boost isotonic drinks and e-commerce

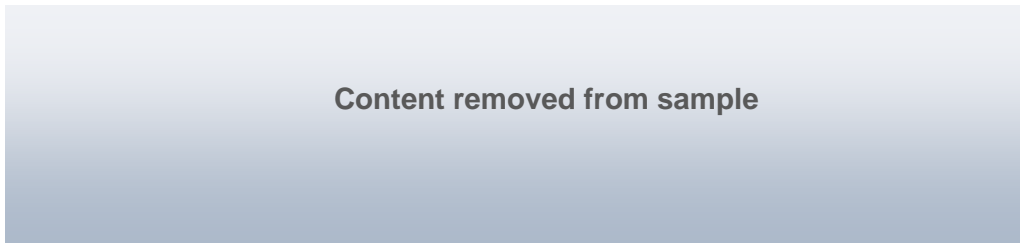
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RECOVERY AND OPPORTUNITIES

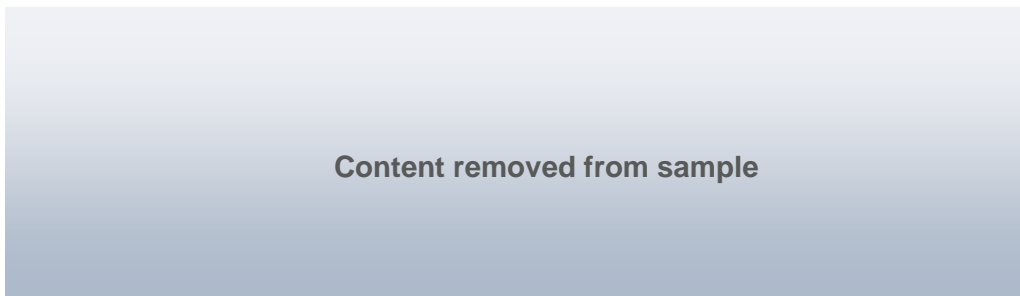
Demand for sports drinks will be boosted by increasingly hot summer temperatures



Scope for strong growth in A developing category, as Estonians embrace sporting activity



Functional bottled water poses A threat, but sports drink players can rise to the challenge



CATEGORY DATA

Table 131 Off-trade Sales of Sports Drinks: Volume 2015-2020

million litres

	2015	2016	2017	2018	2019	2020
Sports Drinks	Data removed from sample					

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 132 Off-trade Sales of Sports Drinks: Value 2015-2020

EUR million

	2015	2016	2017	2018	2019	2020
Sports Drinks	Data removed from sample					

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 133 Off-trade Sales of Sports Drinks: % Volume Growth 2015-2020

% volume growth

	2019/20	2015-20 CAGR	2015/20 Total
Sports Drinks	Data removed from sample		

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 134 Off-trade Sales of Sports Drinks: % Value Growth 2015-2020

% current value growth

	2019/20	2015-20 CAGR	2015/20 Total
Sports Drinks	Data removed from sample		

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 135 NBO Company Shares of Off-trade Sports Drinks: % Volume 2016-2020

% off-trade volume
Company

	2016	2017	2018	2019	2020
	Data removed from sample				

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 136 LBN Brand Shares of Off-trade Sports Drinks: % Volume 2017-2020

% off-trade volume
Brand (GBO)

Company (NBO)	2017	2018	2019	2020
	Data removed from sample			

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 137 NBO Company Shares of Off-trade Sports Drinks: % Value 2016-2020

% off-trade value rsp Company	2016	2017	2018	2019	2020
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Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 138 LBN Brand Shares of Off-trade Sports Drinks: % Value 2017-2020

% off-trade value rsp Brand (GBO)	Company (NBO)	2017	2018	2019	2020
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Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 139 Forecast Off-trade Sales of Sports Drinks: Volume 2020-2025

million litres	2020	2021	2022	2023	2024	2025
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Sports Drinks

Data removed from sample

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 140 Forecast Off-trade Sales of Sports Drinks: Value 2020-2025

EUR million	2020	2021	2022	2023	2024	2025
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Sports Drinks

Data removed from sample

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 141 Forecast Off-trade Sales of Sports Drinks: % Volume Growth 2020-2025

% volume growth

2020/21 2020-25 CAGR 2020/25 Total

Sports Drinks

Data removed from sample

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 142 Forecast Off-trade Sales of Sports Drinks: % Value Growth 2020-2025

% constant value growth

2020/2021 2020-25 CAGR 2020/25 Total

Sports Drinks

Data removed from sample

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources