



Euromonitor
International

Soft Drinks in Estonia

February 2025

Table of Contents

EXECUTIVE SUMMARY

- Soft drinks in 2024: The big picture
- 2024 key trends
- Competitive landscape
- Retailing developments
- Foodservice vs retail split
- What next for soft drinks?

MARKET DATA

- Table 1 - Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: Volume 2019-2024
- Table 2 - Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: % Volume Growth 2019-2024
- Table 3 - Off-trade vs On-trade Sales of Soft Drinks by Channel: Value 2019-2024
- Table 4 - Off-trade vs On-trade Sales of Soft Drinks by Channel: % Value Growth 2019-2024
- Table 5 - Off-trade vs On-trade Sales of Soft Drinks (as sold) by Category: Volume 2024
- Table 6 - Off-trade vs On-trade Sales of Soft Drinks (as sold) by Category: % Volume 2024
- Table 7 - Off-trade vs On-trade Sales of Soft Drinks by Category: Value 2024
- Table 8 - Off-trade vs On-trade Sales of Soft Drinks by Category: % Value 2024
- Table 9 - Off-trade Sales of Soft Drinks (RTD) by Category: Volume 2019-2024
- Table 10 - Off-trade Sales of Soft Drinks (RTD) by Category: % Volume Growth 2019-2024
- Table 11 - Off-trade Sales of Soft Drinks by Category: Value 2019-2024
- Table 12 - Off-trade Sales of Soft Drinks by Category: % Value Growth 2019-2024
- Table 13 - Sales of Soft Drinks by Total Fountain On-trade: Volume 2019-2024
- Table 14 - Sales of Soft Drinks by Total Fountain On-trade: % Volume Growth 2019-2024
- Table 15 - NBO Company Shares of Off-trade Soft Drinks (RTD): % Volume 2020-2024
- Table 16 - LBN Brand Shares of Off-trade Soft Drinks (RTD): % Volume 2021-2024
- Table 17 - NBO Company Shares of Off-trade Soft Drinks: % Value 2020-2024
- Table 18 - LBN Brand Shares of Off-trade Soft Drinks: % Value 2021-2024
- Table 19 - Penetration of Private Label in Off-trade Soft Drinks (RTD) by Category: % Volume 2019-2024
- Table 20 - Penetration of Private Label in Off-trade Soft Drinks by Category: % Value 2019-2024
- Table 21 - Distribution of Off-trade Soft Drinks (as sold) by Format: % Volume 2019-2024
- Table 22 - Distribution of Off-trade Soft Drinks (as sold) by Format and Category: % Volume 2024
- Table 23 - Forecast Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: Volume 2024-2029
- Table 24 - Forecast Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: % Volume Growth 2024-2029
- Table 25 - Forecast Off-trade vs On-trade Sales of Soft Drinks by Channel: Value 2024-2029
- Table 26 - Forecast Off-trade vs On-trade Sales of Soft Drinks by Channel: % Value Growth 2024-2029
- Table 27 - Forecast Off-trade Sales of Soft Drinks (RTD) by Category: Volume 2024-2029
- Table 28 - Forecast Off-trade Sales of Soft Drinks (RTD) by Category: % Volume Growth 2024-2029
- Table 29 - Forecast Off-trade Sales of Soft Drinks by Category: Value 2024-2029
- Table 30 - Forecast Off-trade Sales of Soft Drinks by Category: % Value Growth 2024-2029
- Table 31 - Forecast Sales of Soft Drinks by Total Fountain On-trade: Volume 2024-2029
- Table 32 - Forecast Sales of Soft Drinks by Total Fountain On-trade: % Volume Growth 2024-2029

DISCLAIMER

SOURCES

- Summary 1 - Research Sources

KEY DATA FINDINGS

2024 DEVELOPMENTS

Renaissance of bottled water
The surge in private label products
Changes in the area of mineral water

PROSPECTS AND OPPORTUNITIES

A return to moderate growth
Continued expansion of private label bottled water
E-commerce as a growing channel for bottled water

CATEGORY DATA

Table 33 - Off-trade Sales of Bottled Water by Category: Volume 2019-2024
Table 34 - Off-trade Sales of Bottled Water by Category: Value 2019-2024
Table 35 - Off-trade Sales of Bottled Water by Category: % Volume Growth 2019-2024
Table 36 - Off-trade Sales of Bottled Water by Category: % Value Growth 2019-2024
Table 37 - NBO Company Shares of Off-trade Bottled Water: % Volume 2020-2024
Table 38 - LBN Brand Shares of Off-trade Bottled Water: % Volume 2021-2024
Table 39 - NBO Company Shares of Off-trade Bottled Water: % Value 2020-2024
Table 40 - LBN Brand Shares of Off-trade Bottled Water: % Value 2021-2024
Table 41 - Forecast Off-trade Sales of Bottled Water by Category: Volume 2024-2029
Table 42 - Forecast Off-trade Sales of Bottled Water by Category: Value 2024-2029
Table 43 - Forecast Off-trade Sales of Bottled Water by Category: % Volume Growth 2024-2029
Table 44 - Forecast Off-trade Sales of Bottled Water by Category: % Value Growth 2024-2029

Carbonates in Estonia

KEY DATA FINDINGS

2024 DEVELOPMENTS

Stable performance driven by seasonal and economic factors
The rising popularity of lemon and lime flavours
Cola carbonates: A tale of two trends

PROSPECTS AND OPPORTUNITIES

Limited growth amid stagnant demand
Opportunities in the tonics subcategory
The divergent trajectory of orange carbonates

CATEGORY DATA

Table 45 - Off-trade vs On-trade Sales of Carbonates: Volume 2019-2024
Table 46 - Off-trade vs On-trade Sales of Carbonates: Value 2019-2024
Table 47 - Off-trade vs On-trade Sales of Carbonates: % Volume Growth 2019-2024
Table 48 - Off-trade vs On-trade Sales of Carbonates: % Value Growth 2019-2024
Table 49 - Off-trade Sales of Carbonates by Category: Volume 2019-2024
Table 50 - Off-trade Sales of Carbonates by Category: Value 2019-2024
Table 51 - Off-trade Sales of Carbonates by Category: % Volume Growth 2019-2024
Table 52 - Off-trade Sales of Carbonates by Category: % Value Growth 2019-2024
Table 53 - Sales of Carbonates by Total Fountain On-trade: Volume 2019-2024
Table 54 - Sales of Carbonates by Total Fountain On-trade: % Volume Growth 2019-2024
Table 55 - NBO Company Shares of Off-trade Carbonates: % Volume 2020-2024
Table 56 - LBN Brand Shares of Off-trade Carbonates: % Volume 2021-2024
Table 57 - NBO Company Shares of Off-trade Carbonates: % Value 2020-2024
Table 58 - LBN Brand Shares of Off-trade Carbonates: % Value 2021-2024
Table 59 - Forecast Off-trade Sales of Carbonates by Category: Volume 2024-2029
Table 60 - Forecast Off-trade Sales of Carbonates by Category: Value 2024-2029

Table 61 - Forecast Off-trade Sales of Carbonates by Category: % Volume Growth 2024-2029

Table 62 - Forecast Off-trade Sales of Carbonates by Category: % Value Growth 2024-2029

Table 63 - Forecast Sales of Carbonates by Total Fountain On-trade: Volume 2024-2029

Table 64 - Forecast Sales of Carbonates by Total Fountain On-trade: % Volume Growth 2024-2029

Concentrates in Estonia

KEY DATA FINDINGS

2024 DEVELOPMENTS

- Persistent stagnation amidst challenges
- Dominance of local players and familiar flavours
- Diverging private label strategies

PROSPECTS AND OPPORTUNITIES

- An unlikely revival
- Local brands set to maintain their grip
- Gradual shift towards premium offerings

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 2019-2024
- Table 66 - Off-trade Sales of Concentrates by Category: Value 2019-2024
- Table 67 - Off-trade Sales of Concentrates (RTD) by Category: % Volume Growth 2019-2024
- Table 68 - Off-trade Sales of Concentrates by Category: % Value Growth 2019-2024
- Table 69 - NBO Company Shares of Off-trade Concentrates (RTD): % Volume 2020-2024
- Table 70 - LBN Brand Shares of Off-trade Concentrates (RTD): % Volume 2021-2024
- Table 71 - NBO Company Shares of Off-trade Concentrates: % Value 2020-2024
- Table 72 - LBN Brand Shares of Off-trade Concentrates: % Value 2021-2024
- Table 73 - NBO Company Shares of Off-trade Liquid Concentrates (RTD): % Volume 2020-2024
- Table 74 - LBN Brand Shares of Off-trade Liquid Concentrates (RTD): % Volume 2021-2024
- Table 75 - NBO Company Shares of Off-trade Powder Concentrates (RTD): % Volume 2020-2024
- Table 76 - LBN Brand Shares of Off-trade Powder Concentrates (RTD): % Volume 2021-2024
- Table 77 - Forecast Off-trade Sales of Concentrates (RTD) by Category: Volume 2024-2029
- Table 78 - Forecast Off-trade Sales of Concentrates by Category: Value 2024-2029
- Table 79 - Forecast Off-trade Sales of Concentrates (RTD) by Category: % Volume Growth 2024-2029
- Table 80 - Forecast Off-trade Sales of Concentrates by Category: % Value Growth 2024-2029

Juice in Estonia

KEY DATA FINDINGS

2024 DEVELOPMENTS

- Ongoing collapse in juice
- Challenges in premium juice
- The decline of 100% reconstituted juices

PROSPECTS AND OPPORTUNITIES

- Limited recovery with little hope for full rebound
- The ascendance of private label products
- Opportunities for super-premium products in foodservice

CATEGORY DATA

Table 81 - Off-trade Sales of Juice by Category: Volume 2019-2024

Table 82 - Off-trade Sales of Juice by Category: Value 2019-2024

Table 83 - Off-trade Sales of Juice by Category: % Volume Growth 2019-2024

Table 84 - Off-trade Sales of Juice by Category: % Value Growth 2019-2024

Table 85 - NBO Company Shares of Off-trade Juice: % Volume 2020-2024

Table 86 - LBN Brand Shares of Off-trade Juice: % Volume 2021-2024

Table 87 - NBO Company Shares of Off-trade Juice: % Value 2020-2024

Table 88 - LBN Brand Shares of Off-trade Juice: % Value 2021-2024

Table 89 - Forecast Off-trade Sales of Juice by Category: Volume 2024-2029

Table 90 - Forecast Off-trade Sales of Juice by Category: Value 2024-2029

Table 91 - Forecast Off-trade Sales of Juice by Category: % Volume Growth 2024-2029

Table 92 - Forecast Off-trade Sales of Juice by Category: % Value Growth 2024-2029

RTD Coffee in Estonia

KEY DATA FINDINGS

2024 DEVELOPMENTS

Seasonal demand drives growth

Löfbergs' success with canned offerings

Impulse purchases in forecourt retail

PROSPECTS AND OPPORTUNITIES

Seasonality limits growth potential

Competition from other beverages

Opportunities in convenience and active lifestyles

CATEGORY DATA

Table 93 - Off-trade Sales of RTD Coffee: Volume 2019-2024

Table 94 - Off-trade Sales of RTD Coffee: Value 2019-2024

Table 95 - Off-trade Sales of RTD Coffee: % Volume Growth 2019-2024

Table 96 - Off-trade Sales of RTD Coffee: % Value Growth 2019-2024

Table 97 - NBO Company Shares of Off-trade RTD Coffee: % Volume 2020-2024

Table 98 - LBN Brand Shares of Off-trade RTD Coffee: % Volume 2021-2024

Table 99 - NBO Company Shares of Off-trade RTD Coffee: % Value 2020-2024

Table 100 - LBN Brand Shares of Off-trade RTD Coffee: % Value 2021-2024

Table 101 - Forecast Off-trade Sales of RTD Coffee: Volume 2024-2029

Table 102 - Forecast Off-trade Sales of RTD Coffee: Value 2024-2029

Table 103 - Forecast Off-trade Sales of RTD Coffee: % Volume Growth 2024-2029

Table 104 - Forecast Off-trade Sales of RTD Coffee: % Value Growth 2024-2029

RTD Tea in Estonia

KEY DATA FINDINGS

2024 DEVELOPMENTS

Limited innovation and declining sales

Emerging demand for low-sugar options

Brand diversification and functional RTD tea

PROSPECTS AND OPPORTUNITIES

Continued decline expected

Functional and low-sugar niches offer some potential

Nestea's dominance and limited private label presence

CATEGORY DATA

Table 105 - Off-trade Sales of RTD Tea by Category: Volume 2019-2024

Table 106 - Off-trade Sales of RTD Tea by Category: Value 2019-2024

Table 107 - Off-trade Sales of RTD Tea by Category: % Volume Growth 2019-2024

Table 108 - Off-trade Sales of RTD Tea by Category: % Value Growth 2019-2024

Table 109 - NBO Company Shares of Off-trade RTD Tea: % Volume 2020-2024

Table 110 - LBN Brand Shares of Off-trade RTD Tea: % Volume 2021-2024

Table 111 - NBO Company Shares of Off-trade RTD Tea: % Value 2020-2024

Table 112 - LBN Brand Shares of Off-trade RTD Tea: % Value 2021-2024

Table 113 - Forecast Off-trade Sales of RTD Tea by Category: Volume 2024-2029

Table 114 - Forecast Off-trade Sales of RTD Tea by Category: Value 2024-2029

Table 115 - Forecast Off-trade Sales of RTD Tea by Category: % Volume Growth 2024-2029

Table 116 - Forecast Off-trade Sales of RTD Tea by Category: % Value Growth 2024-2029

Energy Drinks in Estonia

KEY DATA FINDINGS

2024 DEVELOPMENTS

Continued growth amidst challenges

Integration within the functional beverage ecosystem

The rise of battery as a competitor

PROSPECTS AND OPPORTUNITIES

Sustained growth as a leading beverage category

Economic challenges and their impact on growth

Brand dominance and limited private label presence

CATEGORY DATA

Table 117 - Off-trade Sales of Energy Drinks: Volume 2019-2024

Table 118 - Off-trade Sales of Energy Drinks: Value 2019-2024

Table 119 - Off-trade Sales of Energy Drinks: % Volume Growth 2019-2024

Table 120 - Off-trade Sales of Energy Drinks: % Value Growth 2019-2024

Table 121 - NBO Company Shares of Off-trade Energy Drinks: % Volume 2020-2024

Table 122 - LBN Brand Shares of Off-trade Energy Drinks: % Volume 2021-2024

Table 123 - NBO Company Shares of Off-trade Energy Drinks: % Value 2020-2024

Table 124 - LBN Brand Shares of Off-trade Energy Drinks: % Value 2021-2024

Table 125 - Forecast Off-trade Sales of Energy Drinks: Volume 2024-2029

Table 126 - Forecast Off-trade Sales of Energy Drinks: Value 2024-2029

Table 127 - Forecast Off-trade Sales of Energy Drinks: % Volume Growth 2024-2029

Table 128 - Forecast Off-trade Sales of Energy Drinks: % Value Growth 2024-2029

Sports Drinks in Estonia

KEY DATA FINDINGS

2024 DEVELOPMENTS

Impressive growth in sports drinks

A generational shift towards functional beverages

Expansion in product offerings and brand presence

PROSPECTS AND OPPORTUNITIES

Sustained growth driven by functional appeal

Challenges from competing functional beverages

CATEGORY DATA

Table 129 - Off-trade Sales of Sports Drinks: Volume 2019-2024

Table 130 - Off-trade Sales of Sports Drinks: Value 2019-2024

Table 131 - Off-trade Sales of Sports Drinks: % Volume Growth 2019-2024

Table 132 - Off-trade Sales of Sports Drinks: % Value Growth 2019-2024

Table 133 - NBO Company Shares of Off-trade Sports Drinks: % Volume 2020-2024

Table 134 - LBN Brand Shares of Off-trade Sports Drinks: % Volume 2021-2024

Table 135 - NBO Company Shares of Off-trade Sports Drinks: % Value 2020-2024

Table 136 - LBN Brand Shares of Off-trade Sports Drinks: % Value 2021-2024

Table 137 - Forecast Off-trade Sales of Sports Drinks: Volume 2024-2029

Table 138 - Forecast Off-trade Sales of Sports Drinks: Value 2024-2029

Table 139 - Forecast Off-trade Sales of Sports Drinks: % Volume Growth 2024-2029

Table 140 - Forecast Off-trade Sales of Sports Drinks: % Value Growth 2024-2029

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.