



# Juice in Estonia

February 2025

Table of Contents

## 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 1 - Off-trade Sales of Juice by Category: Volume 2019-2024  
Table 2 - Off-trade Sales of Juice by Category: Value 2019-2024  
Table 3 - Off-trade Sales of Juice by Category: % Volume Growth 2019-2024  
Table 4 - Off-trade Sales of Juice by Category: % Value Growth 2019-2024  
Table 5 - NBO Company Shares of Off-trade Juice: % Volume 2020-2024  
Table 6 - LBN Brand Shares of Off-trade Juice: % Volume 2021-2024  
Table 7 - NBO Company Shares of Off-trade Juice: % Value 2020-2024  
Table 8 - LBN Brand Shares of Off-trade Juice: % Value 2021-2024  
Table 9 - Forecast Off-trade Sales of Juice by Category: Volume 2024-2029  
Table 10 - Forecast Off-trade Sales of Juice by Category: Value 2024-2029  
Table 11 - Forecast Off-trade Sales of Juice by Category: % Volume Growth 2024-2029  
Table 12 - Forecast Off-trade Sales of Juice by Category: % Value Growth 2024-2029

## Soft Drinks in Estonia - Industry Overview

### 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 13 - Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: Volume 2019-2024  
Table 14 - Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: % Volume Growth 2019-2024  
Table 15 - Off-trade vs On-trade Sales of Soft Drinks by Channel: Value 2019-2024  
Table 16 - Off-trade vs On-trade Sales of Soft Drinks by Channel: % Value Growth 2019-2024  
Table 17 - Off-trade vs On-trade Sales of Soft Drinks (as sold) by Category: Volume 2024  
Table 18 - Off-trade vs On-trade Sales of Soft Drinks (as sold) by Category: % Volume 2024  
Table 19 - Off-trade vs On-trade Sales of Soft Drinks by Category: Value 2024  
Table 20 - Off-trade vs On-trade Sales of Soft Drinks by Category: % Value 2024  
Table 21 - Off-trade Sales of Soft Drinks (RTD) by Category: Volume 2019-2024  
Table 22 - Off-trade Sales of Soft Drinks (RTD) by Category: % Volume Growth 2019-2024  
Table 23 - Off-trade Sales of Soft Drinks by Category: Value 2019-2024  
Table 24 - Off-trade Sales of Soft Drinks by Category: % Value Growth 2019-2024  
Table 25 - Sales of Soft Drinks by Total Fountain On-trade: Volume 2019-2024  
Table 26 - Sales of Soft Drinks by Total Fountain On-trade: % Volume Growth 2019-2024  
Table 27 - NBO Company Shares of Off-trade Soft Drinks (RTD): % Volume 2020-2024

Table 28 - LBN Brand Shares of Off-trade Soft Drinks (RTD): % Volume 2021-2024

Table 29 - NBO Company Shares of Off-trade Soft Drinks: % Value 2020-2024

Table 30 - LBN Brand Shares of Off-trade Soft Drinks: % Value 2021-2024

Table 31 - Penetration of Private Label in Off-trade Soft Drinks (RTD) by Category: % Volume 2019-2024

Table 32 - Penetration of Private Label in Off-trade Soft Drinks by Category: % Value 2019-2024

Table 33 - Distribution of Off-trade Soft Drinks (as sold) by Format: % Volume 2019-2024

Table 34 - Distribution of Off-trade Soft Drinks (as sold) by Format and Category: % Volume 2024

Table 35 - Forecast Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: Volume 2024-2029

Table 36 - Forecast Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: % Volume Growth 2024-2029

Table 37 - Forecast Off-trade vs On-trade Sales of Soft Drinks by Channel: Value 2024-2029

Table 38 - Forecast Off-trade vs On-trade Sales of Soft Drinks by Channel: % Value Growth 2024-2029

Table 39 - Forecast Off-trade Sales of Soft Drinks (RTD) by Category: Volume 2024-2029

Table 40 - Forecast Off-trade Sales of Soft Drinks (RTD) by Category: % Volume Growth 2024-2029

Table 41 - Forecast Off-trade Sales of Soft Drinks by Category: Value 2024-2029

Table 42 - Forecast Off-trade Sales of Soft Drinks by Category: % Value Growth 2024-2029

Table 43 - Forecast Sales of Soft Drinks by Total Fountain On-trade: Volume 2024-2029

Table 44 - Forecast Sales of Soft Drinks by Total Fountain On-trade: % Volume Growth 2024-2029

## DISCLAIMER

## SOURCES

Summary 1 - Research Sources

## 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/juice-in-estonia/report](http://www.euromonitor.com/juice-in-estonia/report).