

# Beer in Estonia

July 2023

**Table of Contents** 

#### Beer in Estonia - Category analysis

#### **KEY DATA FINDINGS**

#### 2022 DEVELOPMENTS

Ale benefits from premiumisation trend and the reopening of society Lidl's entry threatens to disrupt the competitive landscape A Le Coq leverages a strong portfolio and wide price points to lead the field

#### PROSPECTS AND OPPORTUNITIES

Healthier lifestyles and technology to push non alcoholic beer Sustainability concerns to inform beer choices Imported economy lager to struggle in the forecast period

#### CATEGORY BACKGROUND

Lager price band methodology Summary 1 - Lager by Price Band 2022

#### CATEGORY DATA

Table 1 - Sales of Beer by Category: Total Volume 2017-2022
Table 2 - Sales of Beer by Category: Total Value 2017-2022
Table 3 - Sales of Beer by Category: % Total Volume Growth 2017-2022
Table 4 - Sales of Beer by Off-trade vs On-trade: Volume 2017-2022
Table 5 - Sales of Beer by Off-trade vs On-trade: Value 2017-2022
Table 6 - Sales of Beer by Off-trade vs On-trade: Value 2017-2022
Table 7 - Sales of Beer by Off-trade vs On-trade: % Volume Growth 2017-2022
Table 8 - Sales of Beer by Off-trade vs On-trade: % Value Growth 2017-2022
Table 9 - GBO Company Shares of Beer: % Total Volume 2018-2022
Table 10 - NBO Company Shares of Beer: % Total Volume 2019-2022
Table 11 - LBN Brand Shares of Beer: % Total Volume 2019-2022
Table 12 - Forecast Sales of Beer by Category: Total Value 2022-2027
Table 13 - Forecast Sales of Beer by Category: % Total Value Crowth 2022-2027
Table 14 - Forecast Sales of Beer by Category: % Total Value Crowth 2022-2027

#### Alcoholic Drinks in Estonia - Industry Overview

#### EXECUTIVE SUMMARY

Alcoholic drinks in 2022: The big picture 2022 key trends Competitive landscape Retailing developments On-trade vs off-trade split What next for alcoholic drinks?

#### MARKET BACKGROUND

Legislation Legal purchasing age and legal drinking age Drink driving Advertising Smoking ban Opening hours On-trade establishments

#### TAXATION AND DUTY LEVIES

Summary 2 - Taxation and Duty Levies on Alcoholic Drinks 2022

#### OPERATING ENVIRONMENT

Contraband/parallel trade Duty free Cross-border/private imports

#### KEY NEW PRODUCT LAUNCHES

Outlook

#### MARKET INDICATORS

Table 16 - Retail Consumer Expenditure on Alcoholic Drinks 2017-2022

#### MARKET DATA

Table 17 - Sales of Alcoholic Drinks by Category: Total Volume 2017-2022
Table 18 - Sales of Alcoholic Drinks by Category: Total Value 2017-2022
Table 19 - Sales of Alcoholic Drinks by Category: % Total Volume Growth 2017-2022
Table 20 - Sales of Alcoholic Drinks by Category: % Total Value Growth 2017-2022
Table 21 - Sales of Alcoholic Drinks by Category by Off-trade vs On-trade: Volume 2022
Table 22 - Sales of Alcoholic Drinks by Category by Off-trade vs On-trade: Value 2022
Table 23 - Sales of Alcoholic Drinks by Category by Off-trade vs On-trade: % Volume 2022
Table 24 - Sales of Alcoholic Drinks by Category by Off-trade vs On-trade: % Value 2022
Table 25 - GBO Company Shares of Alcoholic Drinks by Format: % Off-trade Value 2017-2022
Table 26 - Distribution of Alcoholic Drinks by Format and by Category: % Off-trade Volume 2022
Table 27 - Distribution of Alcoholic Drinks by Category: Total Volume 2022-2027
Table 28 - Forecast Sales of Alcoholic Drinks by Category: Total Volume 2022-2027
Table 29 - Forecast Sales of Alcoholic Drinks by Category: Total Value 2022-2027
Table 30 - Forecast Sales of Alcoholic Drinks by Category: % Total Volume Growth 2022-2027
Table 31 - Forecast Sales of Alcoholic Drinks by Category: % Total Volume Growth 2022-2027

#### DISCLAIMER

#### SOURCES

Summary 3 - 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.