

# Cider/Perry in Estonia

July 2023

Table of Contents

## KEY DATA FINDINGS

### 2022 DEVELOPMENTS

Cider/perry loses ground to cheaper flavoured/mixed lager  
Rising prices contribute to fall in demand in the on-trade channel  
Smaller players increase the pressure on the leaders

### PROSPECTS AND OPPORTUNITIES

Cider/perry to continue its downward demand trajectory  
Flavoured and craft options to offer some growth potential  
Changing consumer shopping behaviour to disrupt distribution patterns

### CATEGORY DATA

Table 1 - Sales of Cider/Perry: Total Volume 2017-2022  
Table 2 - Sales of Cider/Perry: Total Value 2017-2022  
Table 3 - Sales of Cider/Perry: % Total Volume Growth 2017-2022  
Table 4 - Sales of Cider/Perry: % Total Value Growth 2017-2022  
Table 5 - Sales of Cider/Perry by Off-trade vs On-trade: Volume 2017-2022  
Table 6 - Sales of Cider/Perry by Off-trade vs On-trade: Value 2017-2022  
Table 7 - Sales of Cider/Perry by Off-trade vs On-trade: % Volume Growth 2017-2022  
Table 8 - Sales of Cider/Perry by Off-trade vs On-trade: % Value Growth 2017-2022  
Table 9 - GBO Company Shares of Cider/Perry: % Total Volume 2018-2022  
Table 10 - NBO Company Shares of Cider/Perry: % Total Volume 2018-2022  
Table 11 - LBN Brand Shares of Cider/Perry: % Total Volume 2019-2022  
Table 12 - Forecast Sales of Cider/Perry: Total Volume 2022-2027  
Table 13 - Forecast Sales of Cider/Perry: Total Value 2022-2027  
Table 14 - Forecast Sales of Cider/Perry: % Total Volume Growth 2022-2027  
Table 15 - Forecast Sales of Cider/Perry: % Total Value Growth 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 1 - 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: % Total Volume 2018-2022

Table 26 - Distribution of Alcoholic Drinks by Format: % Off-trade Value 2017-2022

Table 27 - Distribution of Alcoholic Drinks by Format and by Category: % Off-trade Volume 2022

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 Value Growth 2022-2027

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## SOURCES

Summary 2 - Research Sources

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