

Alcoholic Drinks in Estonia

July 2023

Table of Contents

Alcoholic Drinks in Estonia

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

KEYNEW PRODUCT LAUNCHES

Outlook

MARKET INDICATORS

Table 1 - Retail Consumer Expenditure on Alcoholic Drinks 2017-2022

MARKET DATA

- Table 2 Sales of Alcoholic Drinks by Category: Total Volume 2017-2022
- Table 3 Sales of Alcoholic Drinks by Category: Total Value 2017-2022
- Table 4 Sales of Alcoholic Drinks by Category: % Total Volume Growth 2017-2022
- Table 5 Sales of Alcoholic Drinks by Category: % Total Value Growth 2017-2022
- Table 6 Sales of Alcoholic Drinks by Category by Off-trade vs On-trade: Volume 2022
- Table 7 Sales of Alcoholic Drinks by Category by Off-trade vs On-trade: Value 2022
- Table 8 Sales of Alcoholic Drinks by Category by Off-trade vs On-trade: % Volume 2022
- Table 9 Sales of Alcoholic Drinks by Category by Off-trade vs On-trade: % Value 2022
- Table 10 GBO Company Shares of Alcoholic Drinks: % Total Volume 2018-2022
- Table 11 Distribution of Alcoholic Drinks by Format: % Off-trade Value 2017-2022
- Table 12 Distribution of Alcoholic Drinks by Format and by Category: % Off-trade Volume 2022
- Table 13 Forecast Sales of Alcoholic Drinks by Category: Total Volume 2022-2027
- Table 14 Forecast Sales of Alcoholic Drinks by Category: Total Value 2022-2027
- Table 15 Forecast Sales of Alcoholic Drinks by Category: % Total Volume Growth 2022-2027
- Table 16 Forecast Sales of Alcoholic Drinks by Category: % Total Value Growth 2022-2027

DISCLAIMER

SOURCES

Summary 2 - Research Sources

Beer in Estonia

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 3 - Lager by Price Band 2022

CATEGORY DATA

Table 17 - Sales of Beer by Category: Total Volume 2017-2022

Table 18 - Sales of Beer by Category: Total Value 2017-2022

Table 19 - Sales of Beer by Category: % Total Volume Growth 2017-2022

Table 20 - Sales of Beer by Category: % Total Value Growth 2017-2022

Table 21 - Sales of Beer by Off-trade vs On-trade: Volume 2017-2022

Table 22 - Sales of Beer by Off-trade vs On-trade: Value 2017-2022

Table 23 - Sales of Beer by Off-trade vs On-trade: % Volume Growth 2017-2022

Table 24 - Sales of Beer by Off-trade vs On-trade: % Value Growth 2017-2022

Table 25 - GBO Company Shares of Beer: % Total Volume 2018-2022

Table 26 - NBO Company Shares of Beer: % Total Volume 2018-2022

Table 27 - LBN Brand Shares of Beer: % Total Volume 2019-2022

Table 28 - Forecast Sales of Beer by Category: Total Volume 2022-2027

Table 29 - Forecast Sales of Beer by Category: Total Value 2022-2027

Table 30 - Forecast Sales of Beer by Category: % Total Volume Growth 2022-2027

Table 31 - Forecast Sales of Beer by Category: % Total Value Growth 2022-2027

Cider/Perry in Estonia

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 32 - Sales of Cider/Perry: Total Volume 2017-2022

Table 33 - Sales of Cider/Perry: Total Value 2017-2022

Table 34 - Sales of Cider/Perry: % Total Volume Growth 2017-2022

Table 35 - Sales of Cider/Perry: % Total Value Growth 2017-2022

- Table 36 Sales of Cider/Perry by Off-trade vs On-trade: Volume 2017-2022
- Table 37 Sales of Cider/Perry by Off-trade vs On-trade: Value 2017-2022
- Table 38 Sales of Cider/Perry by Off-trade vs On-trade: % Volume Growth 2017-2022
- Table 39 Sales of Cider/Perry by Off-trade vs On-trade: % Value Growth 2017-2022
- Table 40 GBO Company Shares of Cider/Perry: % Total Volume 2018-2022
- Table 41 NBO Company Shares of Cider/Perry: % Total Volume 2018-2022
- Table 42 LBN Brand Shares of Cider/Perry: % Total Volume 2019-2022
- Table 43 Forecast Sales of Cider/Perry: Total Volume 2022-2027
- Table 44 Forecast Sales of Cider/Perry: Total Value 2022-2027
- Table 45 Forecast Sales of Cider/Perry: % Total Volume Growth 2022-2027
- Table 46 Forecast Sales of Cider/Perry: % Total Value Growth 2022-2027

Rtds in Estonia

KEY DATA FINDINGS

2022 DEVELOPMENTS

Spirit-based format drives RTDs

More sophisticated consumers lose interest in wine-based RTDs

Saku Õlletehase and A Le Cog remain well ahead of the pack

PROSPECTS AND OPPORTUNITIES

Spirit-based RTDs retain competitive advantages

Growth opportunities remain despite maturity

Alcohol-free RTDs to tap into the mocktails trend

CATEGORY DATA

- Table 47 Sales of RTDs by Category: Total Volume 2017-2022
- Table 48 Sales of RTDs by Category: Total Value 2017-2022
- Table 49 Sales of RTDs by Category: % Total Volume Growth 2017-2022
- Table 50 Sales of RTDs by Category: % Total Value Growth 2017-2022
- Table 51 Sales of RTDs by Off-trade vs On-trade: Volume 2017-2022
- Table 52 Sales of RTDs by Off-trade vs On-trade: Value 2017-2022
- Table 53 Sales of RTDs by Off-trade vs On-trade: % Volume Growth 2017-2022
- Table 54 Sales of RTDs by Off-trade vs On-trade: % Value Growth 2017-2022
- Table 55 GBO Company Shares of RTDs: % Total Volume 2018-2022
- Table 56 NBO Company Shares of RTDs: % Total Volume 2018-2022
- Table 57 LBN Brand Shares of RTDs: % Total Volume 2019-2022

 Table 58 Forecast Sales of RTDs by Category: Total Volume 2022-2027
- Table 59 Forecast Sales of RTDs by Category: Total Value 2022-2027
- Table 60 Forecast Sales of RTDs by Category: % Total Volume Growth 2022-2027
- Table 61 Forecast Sales of RTDs by Category: % Total Value Growth 2022-2027

Spirits in Estonia

KEY DATA FINDINGS

2022 DEVELOPMENTS

Blended malt Scotch whisky and tequila (and mezcal) enjoy fast-rising popularity Craft and labelling trends emphasise sophistication and more natural claims Liviko leverages quality, a wide offer and strong distribution to lead spirits

PROSPECTS AND OPPORTUNITIES

Popularisation trend to push whiskies

Lidl is set to create waves in the competitive landscape Social media focus to reach young adults

CATEGORY DATA

- Table 62 Sales of Spirits by Category: Total Volume 2017-2022
- Table 63 Sales of Spirits by Category: Total Value 2017-2022
- Table 64 Sales of Spirits by Category: % Total Volume Growth 2017-2022
- Table 65 Sales of Spirits by Category: % Total Value Growth 2017-2022
- Table 66 Sales of Spirits by Off-trade vs On-trade: Volume 2017-2022
- Table 67 Sales of Spirits by Off-trade vs On-trade: Value 2017-2022
- Table 68 Sales of Spirits by Off-trade vs On-trade: % Volume Growth 2017-2022
- Table 69 Sales of Spirits by Off-trade vs On-trade: % Value Growth 2017-2022
- Table 70 GBO Company Shares of Spirits: % Total Volume 2018-2022
- Table 71 NBO Company Shares of Spirits: % Total Volume 2018-2022
- Table 72 LBN Brand Shares of Spirits: % Total Volume 2019-2022
- Table 73 Forecast Sales of Spirits by Category: Total Volume 2022-2027
- Table 74 Forecast Sales of Spirits by Category: Total Value 2022-2027
- Table 75 Forecast Sales of Spirits by Category: % Total Volume Growth 2022-2027
- Table 76 Forecast Sales of Spirits by Category: % Total Value Growth 2022-2027

Wine in Estonia

KEY DATA FINDINGS

2022 DEVELOPMENTS

Low prices drive volume sales of "other" fortified wine in a highly inflationary climate

Widening variety boosts awareness and interest in wine

Still wine suffers from maturity while new consumption occasions boost sparkling wine

PROSPECTS AND OPPORTUNITIES

Wine popularisation trend to stimulate strong sales growth

Increasing awareness and availability to grow the demand for port

Specialist retailers and e-commerce to increase the pressure on supermarkets and hypermarkets

CATEGORY DATA

- Table 77 Sales of Wine by Category: Total Volume 2017-2022
- Table 78 Sales of Wine by Category: Total Value 2017-2022
- Table 79 Sales of Wine by Category: % Total Volume Growth 2017-2022
- Table 80 Sales of Wine by Category: % Total Value Growth 2017-2022
- Table 81 Sales of Wine by Off-trade vs On-trade: Volume 2017-2022
- Table 82 Sales of Wine by Off-trade vs On-trade: Value 2017-2022
- Table 83 Sales of Wine by Off-trade vs On-trade: % Volume Growth 2017-2022
- Table 84 Sales of Wine by Off-trade vs On-trade: % Value Growth 2017-2022
- Table 85 Forecast Sales of Wine by Category: Total Volume 2022-2027
- Table 86 Forecast Sales of Wine by Category: Total Value 2022-2027
- Table 87 Forecast Sales of Wine by Category: % Total Volume Growth 2022-2027
- Table 88 Forecast Sales of Wine by Category: % Total Value Growth 2022-2027

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/alcoholic-drinks-in-estonia/report.