

Bottled Water in Estonia

Euromonitor International January 2021

This sample report is for illustration purposes only. Some content and data have been changed.

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BOTTLED WATER IN ESTONIA -CATEGORY ANALYSIS

KEY DATA FINDINGS

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2020 IMPACT

On-trade and sports facility closures lead to an overall decline in bottled water in 2020

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Functional bottled water performs well as it taps into the growing health and wellness trend

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Carbonated bottled water players gain ground in 2020, despite overall decline of category

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RECOVERY AND OPPORTUNITIES

Innovation will be seen in packaging as well as products as new players enter the scene

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On-trade recovery will give bottled water A boost in 2021, but retail growth will remain modest

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Innovation in functional bottled water will drive sales across the forecast period

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CATEGORY DATA

Table 1 Off-trade Sales of Bottled Water by Category: Volume 2015-2020

million litres	2015	2016	2017	2018	2019	2020
Carbonated Bottled Water Flavoured Bottled Water Functional Bottled Water Still Bottled Water Bottled Water		Data	ı removed	l from san	nple	

Table 2 Off-trade Sales of Bottled Water by Category: Value 2015-2020

EUR million	2015	2016	2017	2018	2019	2020	
Carbonated Bottled Water							
Flavoured Bottled Water Functional Bottled Water Still Bottled Water Bottled Water		Da	ata remo	oved from sa	mple		
Source: Euromonitor International from office store checks, trade interviews, trade			ns, trade pre	ss, company research	3		
Table 3 Off-trade Sales of Bot	tled Wat	er by Category:	% Volume	Growth 2015-2020)		
% volume growth		:	2019/20	2015-20 CAGR	2015/	/20 Total	
Carbonated Bottled Water Flavoured Bottled Water Functional Bottled Water			Data	a removed fro	om samp	ole	
Still Bottled Water Bottled Water							
Source: Euromonitor International from officient store checks, trade interviews, trade			ns, trade pre	ss, company research	,		
Table 4 Off-trade Sales of Bot	tied wat	er by Category:	% Value G	rowth 2015-2020			
% current value growth		:	2019/20	2015-20 CAGR	2015/	20 Total	
Carbonated Bottled Water Flavoured Bottled Water		Data removed from sample					
Functional Bottled Water Still Bottled Water Bottled Water							
Source: Euromonitor International from office store checks, trade interviews, trade			ns, trade pre	ss, company research	,		
Table 5 NBO Company Share	s of Off-	trade Bottled Wa	ater: % Vol	ume 2016-2020			
% off-trade volume Company		2016	2017	2018	2019	2020	
	Data	removed f	rom sar	nple			
				1.12			



Table 6 LBN Brand Shares of Off-trade Bottled Water: % Volume 2017-2020

% off-trade volume Brand (GBO)	Company (NBO)	2017	2018	2019	2020
	Data removed fro	m sample	•		

% off-trade val Company	lue rsp		2016	2017	2018	2019	2020
		Data ren	noved from	m sample	9		

Table 7 NBO Company Shares of Off-trade Bottled Water: % Value 2016-2020

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 8 LBN Brand Shares of Off-trade Bottled Water: % Value 2017-2020

% off-trade value rsp					
Brand (GBO)	Company (NBO)	2017	2018	2019	2020

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Table 9 Forecast Off-trade Sales of Bottled Water by Category: Volume 2020-2025

million I	itres	2020	2021	2022	2023	2024	2025
Flavour Functio	ated Bottled Water ed Bottled Water nal Bottled Water tled Water Water		Data	removed	from san	nple	
Source:	Euromonitor International from trade	e associations, tr	ade press, comp	any research, tra	ade interviews,		

Table 10 Forecast Off-trade Sales of Bottled Water by Category: Value 2020-2025

EUR m	illion	2020	2021	2022	2023	2024	2025		
Flavour Functio	nated Bottled Water red Bottled Water onal Bottled Water ttled Water Water Water		Data	a remov	ved from sam	ple			
Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources									
Table 1 2025	1 Forecast Off-trade S	Sales of Bottle	d Water by C	ategory: %	6 Volume Growth 2	020-			
% volu	me growth		2	2020/21	2020-25 CAGR	2020/2	5 Total		
Flavour Functio	ated Bottled Water red Bottled Water nal Bottled Water ttled Water Water Water			Dat	a removed fro	om samp	le		
Source:	Euromonitor International from t trade sources	rade associations	s, trade press, co	ompany rese	earch, trade interviews	3			
Table 1 2025	2 Forecast Off-trade S	Sales of Bottle	d Water by C	ategory: %	6 Value Growth 202	20-			
% cons	tant value growth		202	20/2021	2020-25 CAGR	2020/2	5 Total		
Carbonated Bottled Water Flavoured Bottled Water Functional Bottled Water							le		

Still Bottled Water Bottled Water Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

SOFT DRINKS IN ESTONIA -INDUSTRY OVERVIEW

EXECUTIVE SUMMARY

COVID-19 impact on soft drinks

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COVID-19 country impact

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Company response

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Retailing shift

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Foodservice vs retail split

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What next for soft drinks?

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MARKET DATA

Table 13 2020	3	Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: Volume 2015-								
million li	tres		2015	2016	2017	2018	2019	2020		
Off-trade On-trade Total					Data rem	oved from sa	ample			
Source:		onitor International from officine trade interviews, trade			tions, trade pre	ss, company researc	h,			
Table 14 2015-20		Off-trade vs On-trade S	Sales of	Soft Drinks (F	RTD) by Cha	nnel: % Volume G	rowth			
% volun	ne grow	rth			2019/20	2015-20 CAGR	2015/2	0 Total		
Off-trade On-trade Total					Data I	emoved fror	n sample			
Source:		onitor International from officinecks, trade interviews, trade		cs, trade associa	tions, trade pre	ess, company researcl	h,			
Table 1	5	Off-trade vs On-trade S	Sales of	Soft Drinks by	y Channel: V	alue 2015-2020				
EUR mi	llion		2015	2016	2017	2018	2019	2020		
Off-trade On-trade Total					Data rem	oved from s	ample			
Source:		onitor International from offici necks, trade interviews, trade		cs, trade associa	tions, trade pre	ess, company researc	h,			
Table 10 2020	6	Off-trade vs On-trade \$	Sales of	Soft Drinks by	y Channel: %	Value Growth 20	15-			
% const	ant val	ue growth			2019/20	2015-20 CAGR	2015/2	0 Total		
Off-trade On-trade Total					Dat	a removed fr	om samp	le		

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 17 Off-trade vs On-trade Sales of Soft Drinks (as sold) by Category: Volume 2019

million litres

		Of	ff-trade	On-trade	Total
Bottled Carbona Concent Juice RTD Co RTD Te Energy Sports I Asian S Soft Driv	ates trates ffee a Drinks Drinks peciality Drinks		Data ren	noved from samp	le
Source: Note:	Euromonitor International from official statistics store checks, trade interviews, trade sources Excludes powder concentrates	s, trade association	s, trade press, comp	any research,	

Table 18	Off-trade vs On-trade Sales of Soft Drinks (as sold) by Category: % Volume
2019	

% volume analysis

	Off-trade	On-trade	Total
Bottled Water Carbonates Concentrates Juice RTD Coffee RTD Tea Energy Drinks Sports Drinks Asian Speciality Drinks Soft Drinks	Data ren	noved from s	sample
Source: Euromonitor International from official statis	tics, trade associations, trade press, con	npany research,	

store checks, trade interviews, trade sources Note: Excludes powder concentrates

Table 19 Off-trade vs On-trade Sales of Soft Drinks by Category: Value 2019

EUR million	Off-trade	On-trade	Total
Bottled Water Carbonates Concentrates Juice RTD Coffee RTD Tea Energy Drinks Sports Drinks Asian Speciality Drinks Soft Drinks	Data	removed from s	sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 20 Off-trade vs On-trade Sales of Soft Drinks by Category: % Value 2019

% value analysis	Off-trade	On-trade	Total
Bottled Water Carbonates Concentrates Juice RTD Coffee RTD Tea Energy Drinks Sports Drinks Asian Speciality Drinks Soft Drinks	Data remove	ed from sample	

Table 21 Off-trade Sales of Soft Drinks (RTD) by Category: Volume 2015-2020

million litres	2015	2016	2017	2018	2019	2020
Bottled Water Carbonates Concentrates Juice RTD Coffee RTD Tea Energy Drinks Sports Drinks Asian Speciality Drinks Soft Drinks		Data	removed	from sam	ple	

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 22 Off-trade Sales of Soft Drinks (RTD) by Category: % Volume Growth 2015-2020

Bottled Water Carbonates	% volume growth	2019/20	2015-20 CAGR	2015/20 Total
Concentrates Juice RTD Coffee RTD Tea Energy Drinks Sports Drinks Asian Speciality Drinks Soft Drinks	Carbonates Concentrates Juice RTD Coffee RTD Tea Energy Drinks Sports Drinks Asian Speciality Drinks	Data	removed from s	sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 23 Off-trade Sales of Soft Drinks by Category: Value 2015-2020

EUR million	2015	2016	2017	2018	2019	2020
Bottled Water Carbonates Concentrates Juice RTD Coffee RTD Tea Energy Drinks Sports Drinks Asian Speciality Drinks Soft Drinks		Dat	a remove	d from sa	mple	

Table 24 Off-trade Sales of Soft Drinks by Category: % Value Growth 2015-2020

% current value growth	2019/20	2015-20 CAGR	2015/20 Total
Bottled Water Carbonates Concentrates Juice RTD Coffee RTD Tea Energy Drinks Sports Drinks Asian Speciality Drinks Soft Drinks	Data	removed from s	sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 25 Sales of Soft Drinks by Total Fountain On-trade: Volume 2015-2020

illion litres								
	2015	2016	2017	2018	2019	2020		
Total Fountain On-trade		Da	ta remo	oved from sar	nple	_		
Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources								
Table 26 Sales of Soft Drinks by Total Fountain On-trade: % Volume Growth 2015-2020								
% fountain volume growth 2019/20 2015-20 CAGR 2015/20 Total								
		2	019/20	2015-20 CAGR	2013/2	20 10181		
Total Fountain On-trade		Data removed from sample						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 27 NBO Company Shares of Off-trade Soft Drinks (RTD): % Volume 2016-2020

% off-trade volume Company	2016	2017	2018	2019	2020
	Data removed fro	m samp	ole		

Table 28LBN Brand Shares of Off-trade Soft Drinks (RTD): % Volume 2017-2020						
% off-trade vol Brand (GBO)	ume Company (NBO)	2017	2018	2019	2020	
	Data removed	from sampl	e			

Data removed from sample

% off-trade value rsp Company	2016	2017	2018	2019	2020
Data r	emoved fro	om samp	le		

Table 29 NBO Company Shares of Off-trade Soft Drinks: % Value 2016-2020

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 30 LBN Brand Shares of Off-trade Soft Drinks: % Value 2017-2020

% off-trade value rsp Brand (GBO)	Company (NBO)	2017	2018	2019	2020			
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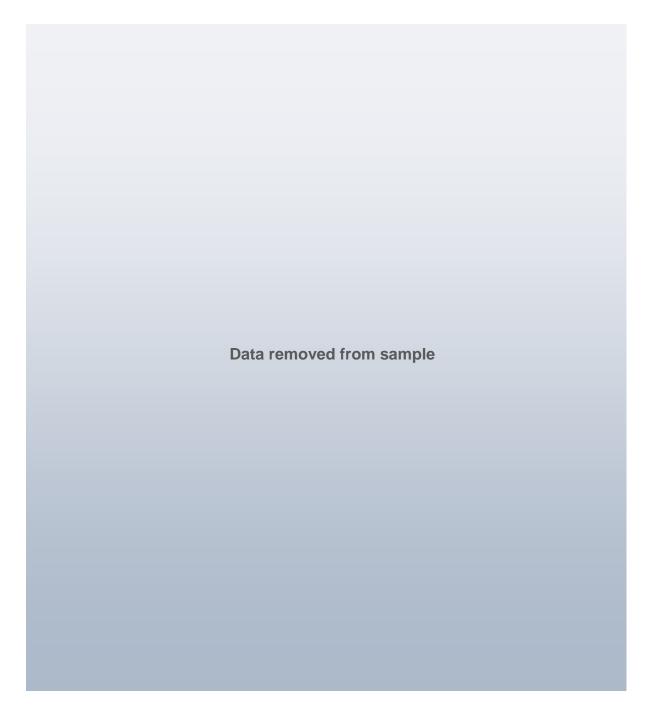


Table 31 Penetration of Private Label in Off-trade Soft Drinks (RTD) by Category: % Volume 2015-2020

% retail rtd volume	2015	2016	2017	2018	2019	2020
Bottled Water Carbonates Concentrates Juice RTD Tea Soft Drinks		Data	removed	from sam	ple	

Table 32	Penetration of Private Label in Off-trade Soft Drinks by Category: % Value
2015-2020	

% retail value rsp	2015	2016	2017	2018	2019	2020
Bottled Water Carbonates Concentrates Juice RTD Tea Soft Drinks		Data	removed	from san	nple	
Source: Euromonitor International from of	icial statistics, tra	do accociations	trada proce cor	nnony rocoarch		

Table 33	Distribution of Off-trade Soft Drinks (as sold) by Format: % Volume 2015-2020
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% off-trade	2015	2016	2017	2018	2019	2020
Store-Based Retailing - Grocery Retailers Modern Grocery Retailers Convenience Stores Discounters Forecourt Retailers Forecourt Retailers Hypermarkets Supermarkets Supermarkets Traditional Grocery Retailers Food/drink/tobacco specialists Independent Small Grocers Other Grocery Retailers Other Grocery Retailers Mixed Retailers Non-Grocery Specialists Non-Store Retailing - Vending - Homeshopping - E-Commerce - Direct Selling Total		Data	a removed	d from sai	mple	

Table 34	Distribution of Off-trade Soft Drinks (as sold) by Format and Category: %
Volume 2020	

% off-trade	BW	СВ	CN	JU	RTDC	RTDT
Store-Based Retailing - Grocery Retailers Modern Grocery Retailers Convenience Stores Discounters Forecourt Retailers Hypermarkets Supermarkets Supermarkets Traditional Grocery Retailers Food/drink/tobacco specialists Independent Small Grocers Other Grocery Retailers - Mixed Retailers - Mixed Retailers - Non-Grocery Specialists Non-Store Retailing - Vending - Homeshopping - E-Commerce - Direct Selling Total		Data	a removed	l from sa	ımple	
Store Record Poteiling	ED	SPD	ASD			
Store-Based Retailing - Grocery Retailers Modern Grocery Retailers Convenience Stores Discounters Forecourt Retailers Forecourt Retailers Traditional Grocery Retailers Food/drink/tobacco specialists Independent Small Grocers Other Grocery Retailers Mixed Retailers - Mixed Retailers - Non-Grocery Specialists Non-Store Retailing - Vending - Homeshopping	Data rem	noved fror	n sample			

- E-Comr - Direct S Total			Data re	moved fr	om sample	9		
 Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources Key: BW = bottled water; CB = carbonates; CN = concentrates; JU = juice; RTDC = RTD coffee; RTDT = RTD tea; ED = energy drinks; SPD = sports drinks; ASD = Asian speciality drinks Note: Excludes powder concentrates 								
Table 35Forecast Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: Volume2020-2025								
million litr	res	2020	2021	2022	2023	2024	2025	
Off-trade On-trade Total			Data	a remove	d from san	nple	_	
Source:	Euromonitor International from trade sources	trade associations	, trade press, cor	npany research	n, trade interviews	,		
Table 36 Volume G	Forecast Off-trade Growth 2020-2025	vs On-trade Sa	les of Soft Dri	nks (RTD) by	Channel: %			
% volume	e growth		20	20/21 20)20-25 CAGR	2020/25	Total	
Off-trade On-trade Total				Data	removed	from sam	ple	
On-trade Total Source:		trade associations	, trade press, cor				ple	
On-trade Total Source:	Euromonitor International from trade sources			npany research	n, trade interviews.	,	ple	
On-trade Total Source:	Euromonitor International from trade sources Forecast Off-trade			npany research	n, trade interviews.	,	ple 2025	
On-trade Total Source: 1 Table 37 2025 EUR milli Off-trade On-trade	Euromonitor International from trade sources Forecast Off-trade	vs On-trade Sa	les of Soft Drin 2021	npany research nks by Chanr 2022	n, trade interviews. nel: Value 2020	,)- 2024		
On-trade Total Source: Table 37 2025 EUR milli Off-trade On-trade Total Source:	Euromonitor International from trade sources Forecast Off-trade	vs On-trade Sa 2020	les of Soft Drin 2021 Data	npany research hks by Chann 2022 a remove	n, trade interviews, nel: Value 2020 2023 ed from sar	, 2024 nple		
On-trade Total Source: Table 37 2025 EUR milli Off-trade On-trade Total Source: Table 38	Euromonitor International from trade sources Forecast Off-trade ion Euromonitor International from trade sources	vs On-trade Sa 2020 trade associations	les of Soft Drin 2021 Data	npany research nks by Chann 2022 a remove	n, trade interviews nel: Value 2020 2023 ed from sar	, 2024 nple		
On-trade Total Source: Table 37 2025 EUR milli Off-trade On-trade Total Source: Table 38 Growth 2	Euromonitor International from trade sources Forecast Off-trade ion Euromonitor International from trade sources Forecast Off-trade	vs On-trade Sa 2020 trade associations	les of Soft Drin 2021 Data , trade press, cor les of Soft Drin	npany research hks by Chann 2022 a remove npany research	n, trade interviews nel: Value 2020 2023 ed from sar	, 2024 nple	2025	

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 39 Forecast Off-trade Sales of Soft Drinks (RTD) by Category: Volume 2020-2025

million li	tres	2020	2021	2022	2023	2024	2025
Bottled V Carbona Concent Juice RTD Co RTD Tea Energy I Sports D Asian Sp Soft Drir	ates trates ffee a Drinks Drinks peciality Drinks		Data	removed	from sam	ple	
Source:	burce: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources						

Table 40Forecast Off-trade Sales of Soft Drinks (RTD) by Category: % Volume Growth2020-2025

% volume growth

	2020/21	2020-25 CAGR	2020/25 Total
Bottled Water Carbonates Concentrates Juice RTD Coffee RTD Tea Energy Drinks Sports Drinks Asian Speciality Drinks Soft Drinks	Data	removed from s	sample

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 41 Forecast Off-trade Sales of Soft Drinks by Category: Value 2020-2025

EUR million	2020	2021	2022	2023	2024	2025
Bottled Water Carbonates Concentrates Juice RTD Coffee RTD Tea Energy Drinks Sports Drinks Asian Speciality Drinks Soft Drinks		Data	a removed	d from sai	nple	

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 42 Forecast Off-trade Sales of Soft Drinks by Category: % Value Growth 2020-2025

% constant value growth		20	20/2021	2020-25 CAGR	2020/25	Total	
Bottled Water Carbonates Concentrates Juice RTD Coffee RTD Tea Energy Drinks Sports Drinks Asian Speciality Drinks Soft Drinks				ata removed fi			
Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources							
Table 43 Forecast Sales of Soft Drinks by Total Fountain On-trade: Volume 2020-2025 million litres							
minor intes	2020	2021	2022	2023	2024	2025	
Total Fountain On-trade	Data removed from sample						
Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources							
Table 44 Forecast Sales of Soft Drinks by Total Fountain On-trade: % Volume Growth 2020-2025							
% fountain volume growth			2020/21	2020-25 CAGR	2020/25	Fotal	
Tatal Fauntain On Incide		Data removed from sample					
Total Fountain On-trade	Dial Fountain On-trade						

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

GLOBAL MACROECONOMIC ENVIRONMENT

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GLOBAL INDUSTRY ENVIRONMENT

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DISCLAIMER

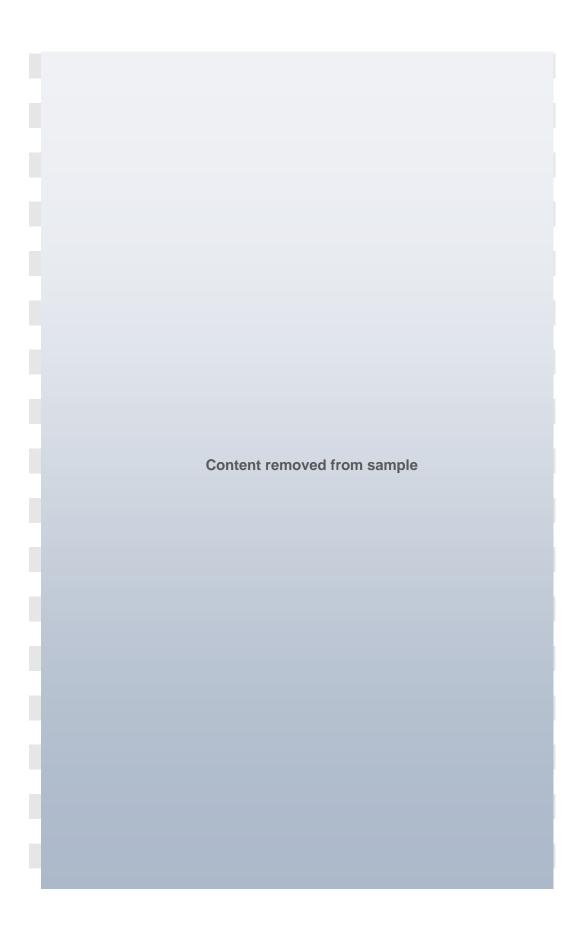
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SOURCES

Sources used during the research included the following:

Summary 1 Research Sources

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Source: Euromonitor International