

# **Sports Drinks 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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# SPORTS DRINKS IN ESTONIA - CATEGORY ANALYSIS

### **KEY DATA FINDINGS**

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### **2020 IMPACT**

Closure of sports facilities and lockdown hits sports drinks hard in 2020

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Local origins and strong promotion help ensure A Le Coq's continued dominance

Content removed from sample

Shifts in consumer behaviour boost isotonic drinks and e-commerce

Content removed from sample

### **RECOVERY AND OPPORTUNITIES**

Demand for sports drinks will be boosted by increasingly hot summer temperatures

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Scope for strong growth in A developing category, as Estonians embrace sporting activity

Content removed from sample

Functional bottled water poses A threat, but sports drink players can rise to the challenge

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### **CATEGORY DATA**

Table 1 Off-trade Sales of Sports Drinks: Volume 2015-2020

million litres

2015 2016 2017 2018 2019 2020

Sports Drinks Data removed from sample

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

Table 2 Off-trade Sales of Sports Drinks: Value 2015-2020

EUR million

2015 2016 2017 2018 2019 2020

Sports Drinks Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research,

store checks, trade interviews, trade sources

Table 3 Off-trade Sales of Sports Drinks: % Volume Growth 2015-2020

% volume growth

2019/20 2015-20 CAGR 2015/20 Total

Sports Drinks Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research,

store checks, trade interviews, trade sources

Table 4 Off-trade Sales of Sports Drinks: % Value Growth 2015-2020

% current value growth

2019/20 2015-20 CAGR 2015/20 Total

Sports Drinks Data removed from sample

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

Table 5 NBO Company Shares of Off-trade Sports Drinks: % Volume 2016-2020

% off-trade volume

Company 2016 2017 2018 2019 2020

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research,

store checks, trade interviews, trade sources

Table 6 LBN Brand Shares of Off-trade Sports Drinks: % Volume 2017-2020

% off-trade volume

Brand (GBO) Company (NBO) 2017 2018 2019 2020

Data removed from sample

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

Table 7 NBO Company Shares of Off-trade Sports Drinks: % Value 2016-2020

% off-trade value rsp

Company 2016 2017 2018 2019 2020

### Data removed from sample

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 Sports Drinks: % Value 2017-2020

% off-trade value rsp

Brand (GBO) Company (NBO) 2017 2018 2019 2020

### Data removed from sample

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

Table 9 Forecast Off-trade Sales of Sports Drinks: Volume 2020-2025

million litres

2020 2021 2022 2023 2024 2025

Sports Drinks Data removed from sample

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

trade sources

Table 10 Forecast Off-trade Sales of Sports Drinks: Value 2020-2025

**EUR** million

2020 2021 2022 2023 2024 2025

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Sports Drinks

### Data removed from sample

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

trade sources

Table 11 Forecast Off-trade Sales of Sports Drinks: % Volume Growth 2020-2025

% volume growth

2020/21 2020-25 CAGR 2020/25 Total

Sports Drinks Data removed from sample

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

Table 12 Forecast Off-trade Sales of Sports Drinks: % Value Growth 2020-2025

% constant value growth

2020/2021 2020-25 CAGR 2020/25 Total

Sports Drinks Data removed from sample

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 s	plit	
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What next for soft drinl	ks?	
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### Content removed from sample

### MARKET DATA

Table 13 Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: Volume 2015-

2020

million litres

2015 2016 2017 2018 2019 2020

Off-trade On-trade Total

Data removed from sample

Euromonitor International from official statistics, trade associations, trade press, company research, Source:

store checks, trade interviews, trade sources

Table 14 Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: % Volume Growth 2015-2020

% volume growth

2019/20 2015-20 CAGR 2015/20 Total

Off-trade On-trade Total

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research,

store checks, trade interviews, trade sources

Table 15 Off-trade vs On-trade Sales of Soft Drinks by Channel: Value 2015-2020

**EUR** million

2015 2016 2017 2018 2019 2020

Off-trade On-trade Total

Data removed from sample

Euromonitor International from official statistics, trade associations, trade press, company research,

store checks, trade interviews, trade sources

Table 16 Off-trade vs On-trade Sales of Soft Drinks by Channel: % Value Growth 2015-2020

% constant value growth

2019/20 2015-20 CAGR 2015/20 Total

### Off-trade On-trade Total

### Data removed from sample

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

Off-trade

On-trade

Data removed from sample

Total

Bottled Water Carbonates Concentrates Juice RTD Coffee RTD Tea Energy Drinks Sports Drinks

Asian Speciality Drinks

Soft Drinks

Source: Euromonitor International from official statistics, trade associations, trade press, company research,

store checks, trade interviews, trade sources

Note: Excludes powder concentrates

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

% volume analysis

Off-trade

On-trade

Data removed from sample

Total

Bottled Water
Carbonates
Concentrates
Juice
RTD Coffee
RTD Tea
Energy Drinks
Sports Drinks
Asian Speciality Drinks

Soft Drinks

Source: Euromonitor International from official statistics, trade associations, trade press, company 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

Data removed from sample

RTD Coffee RTD Tea Energy Drinks Sports Drinks Asian Speciality Drinks Soft Drinks

### Data removed from 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
Soft Drinks

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

### 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 Data removed from sample RTD Coffee RTD Tea **Energy Drinks** Sports Drinks Asian Speciality Drinks Soft Drinks

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

% volume growth 2019/20 2015-20 CAGR 2015/20 Total Bottled Water

Carbonates
Concentrates
Juice
RTD Coffee

Data removed from sample

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RTD Tea **Energy Drinks** Sports Drinks Asian Speciality Drinks Soft Drinks

### Data removed from sample

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

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

EUR million

2015 2016 2020 2017 2018 2019

Data removed from sample

**Bottled Water** Carbonates Concentrates Juice RTD Coffee RTD Tea **Energy Drinks** Sports Drinks Asian Speciality Drinks

Soft Drinks

Euromonitor International from official statistics, trade associations, trade press, company research, Source:

store checks, trade interviews, trade sources

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

% current value growth

2015-20 CAGR 2015/20 Total 2019/20

**Bottled Water** Carbonates Concentrates Juice RTD Coffee RTD Tea **Energy Drinks** Sports Drinks Asian Speciality Drinks Soft Drinks

Data removed from 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

million litres

2016 2017 2018 2019 2015 2020

Data removed from sample Total Fountain On-trade

Euromonitor International from official statistics, trade associations, trade press, company research, Source:

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

Total Fountain On-trade

Data removed from sample

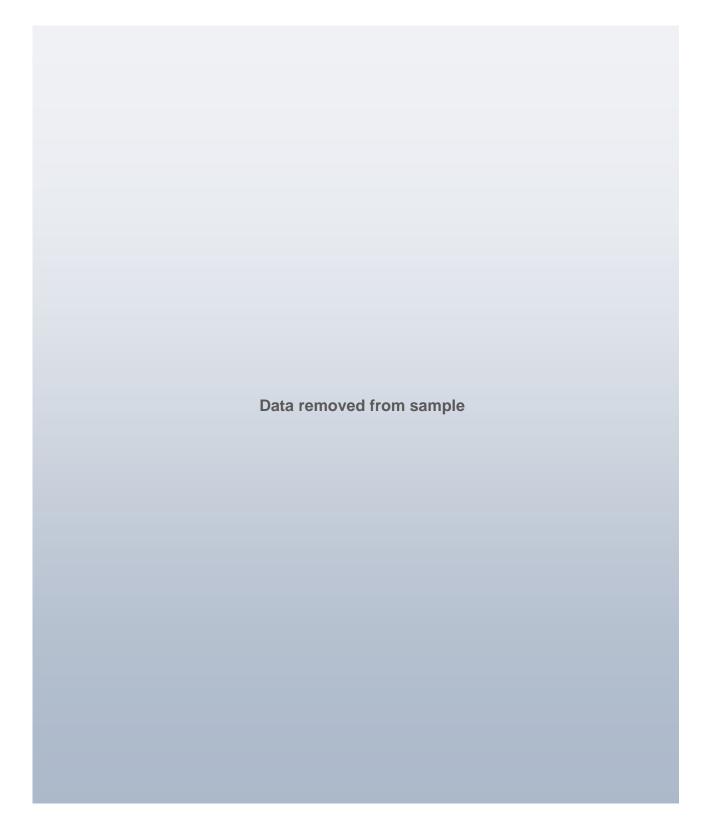
Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

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 from sample

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



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

Table 29 NBO Company Shares of Off-trade Soft Drinks: % Value 2016-2020
% off-trade value rsp
Company 2016 2017 2018 2019 2020

Data removed from sample

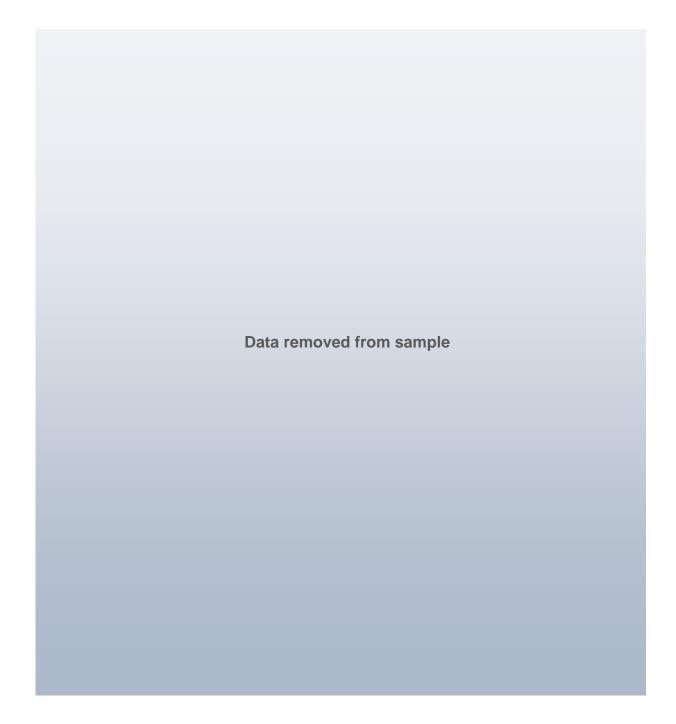
Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

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

### Data removed from sample

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

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

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

# 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 sample

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

### Table 33 Distribution of Off-trade Soft Drinks (as sold) by Format: % Volume 2015-2020

% off-trade 2015 2016 2017 2018 2019 2020 Store-Based Retailing - Grocery Retailers -- Modern Grocery Retailers --- Convenience Stores --- Discounters --- Forecourt Retailers --- Hypermarkets --- Supermarkets -- Traditional Grocery Retailers --- Food/drink/tobacco Data removed from sample specialists --- Independent Small Grocers --- Other Grocery Retailers - Mixed Retailers - Non-Grocery Specialists Non-Store Retailing - Vending - Homeshopping

### - E-Commerce

- Direct Selling Total

### Data removed from sample

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

# 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 -- Traditional Grocery Data removed from sample Retailers --- Food/drink/tobacco specialists --- Independent Small Grocers --- Other Grocery Retailers - Mixed Retailers - Non-Grocery Specialists Non-Store Retailing - Vending - Homeshopping - E-Commerce - Direct Selling Total ASD ED SPD Store-Based Retailing - Grocery Retailers -- Modern Grocery Retailers --- Convenience Stores --- Discounters --- Forecourt Retailers --- Hypermarkets --- Supermarkets Data removed from sample -- Traditional Grocery Retailers --- Food/drink/tobacco specialists --- Independent Small Grocers --- Other Grocery Retailers - Mixed Retailers - Non-Grocery Specialists

Non-Store Retailing

- Vending

- Homeshopping

- E-Commerce

- Direct Selling Total Data removed from sample

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 35 Forecast Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: Volume 2020-2025

million litres

2020 2021 2022 2023 2024 2025

Off-trade Data removed from sample On-trade

Total

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

trade sources

Table 36 Forecast Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: % Volume Growth 2020-2025

% volume growth

2020/21 2020-25 CAGR 2020/25 Total

Off-trade Data removed from sample

On-trade Total

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

trade sources

Table 37 Forecast Off-trade vs On-trade Sales of Soft Drinks by Channel: Value 2020-2025

**EUR** million

2020 2021 2022 2023 2024 2025

Off-trade Data removed from sample

On-trade Total

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

trade sources

Table 38 Forecast Off-trade vs On-trade Sales of Soft Drinks by Channel: % Value Growth 2020-2025

% constant value growth

2020/21 2020-25 CAGR 2020/25 Total

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Off-trade On-trade Total

### Data removed from sample

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

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

million litres

2020 2021 2022 2023 2024 2025

Data removed from sample

**Bottled Water** Carbonates Concentrates Juice RTD Coffee RTD Tea **Energy Drinks** Sports Drinks Asian Speciality Drinks

Soft Drinks

Euromonitor International from trade associations, trade press, company research, trade interviews,

#### Forecast Off-trade Sales of Soft Drinks (RTD) by Category: % Volume Growth Table 40 2020-2025

% volume growth

2020/21 2020-25 CAGR 2020/25 Total

Data removed from sample

**Bottled Water** Carbonates Concentrates Juice RTD Coffee RTD Tea **Energy Drinks** Sports Drinks Asian Speciality Drinks

Soft Drinks

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** 

Data removed from sample

Sports Drinks Asian Speciality Drinks Soft Drinks

### Data removed from sample

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

2020/2021 2020-25 CAGR 2020/25 Total

Data removed from sample

Bottled Water Carbonates Concentrates Juice RTD Coffee RTD Tea Energy Drinks Sports Drinks Asian Speciality Drinks Soft Drinks

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

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 Total

Total Fountain On-trade Data removed from sample

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**

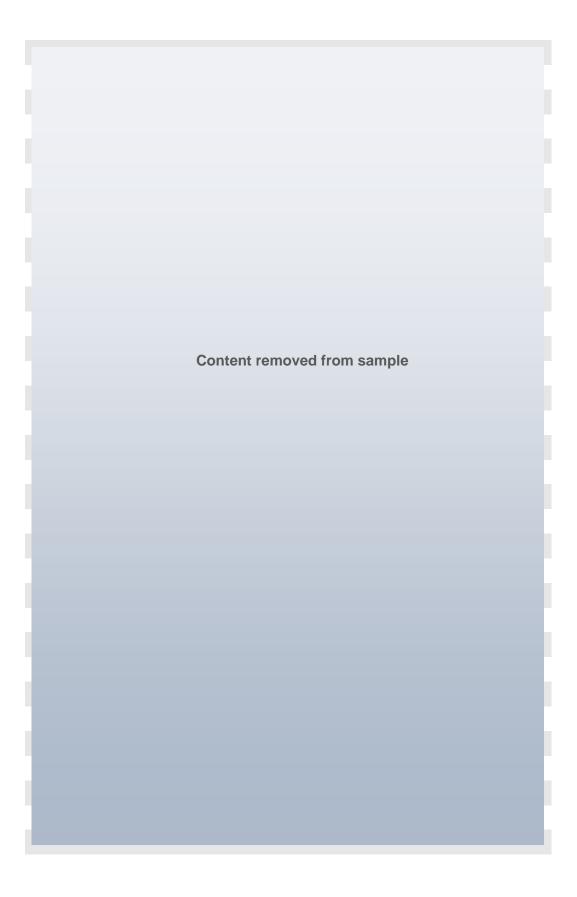
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### **SOURCES**

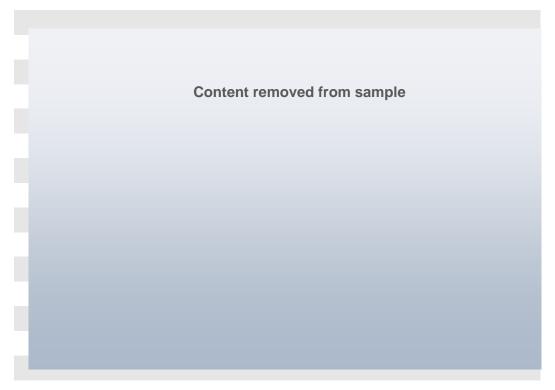
Sources used during the research included the following:

Summary 1 Research Sources

SPORTS DRINKS IN ESTONIA



SPORTS DRINKS IN ESTONIA



Source: Euromonitor International