

# Grocery Retailers in Estonia

April 2023

Table of Contents

### KEY DATA FINDINGS

#### 2022 DEVELOPMENTS

Grocery retailers weather cost of living crisis better than non-grocery operators

Lidl becomes the first discounters chain to enter Estonia

Traditional channels continue to see outlet numbers decline

#### PROSPECTS AND OPPORTUNITIES

High inflation will continue to subdue trade in the short-to-medium term

Competitive pressures set to intensify significantly following arrival of Lidl

Hypermarkets at odds with growing preference for proximity shopping

#### CHANNEL DATA

Table 1 - Grocery Retailers: Value Sales, Outlets and Selling Space 2017-2022

Table 2 - Grocery Retailers: Value Sales, Outlets and Selling Space: % Growth 2017-2022

Table 3 - Sales in Grocery Retailers by Channel: Value 2017-2022

Table 4 - Sales in Grocery Retailers by Channel: % Value Growth 2017-2022

Table 5 - Grocery Retailers Outlets by Channel: Units 2017-2022

Table 6 - Grocery Retailers Outlets by Channel: % Unit Growth 2017-2022

Table 7 - Grocery Retailers GBO Company Shares: % Value 2018-2022

Table 8 - Grocery Retailers GBN Brand Shares: % Value 2019-2022

Table 9 - Grocery Retailers LBN Brand Shares: Outlets 2019-2022

Table 10 - Grocery Retailers Forecasts: Value Sales, Outlets and Selling Space 2022-2027

Table 11 - Grocery Retailers Forecasts: Value Sales, Outlets and Selling Space: % Growth 2022-2027

Table 12 - Forecast Sales in Grocery Retailers by Channel: Value 2022-2027

Table 13 - Forecast Sales in Grocery Retailers by Channel: % Value Growth 2022-2027

Table 14 - Forecast Grocery Retailers Outlets by Channel: Units 2022-2027

Table 15 - Forecast Grocery Retailers Outlets by Channel: % Unit Growth 2022-2027

## Retail in Estonia - Industry Overview

### EXECUTIVE SUMMARY

Retail in 2022: The big picture

Informal retail

What next for retail?

### MARKET DATA

Table 16 - Sales in Retail by Retail Offline vs Retail E-Commerce: Value 2017-2022

Table 17 - Sales in Retail by Retail Offline vs Retail E-Commerce: % Value Growth 2017-2022

Table 18 - Sales in Retail Offline by Channel: Value 2017-2022

Table 19 - Sales in Retail Offline by Channel: % Value Growth 2017-2022

Table 20 - Retail Offline Outlets by Channel: Units 2017-2022

Table 21 - Retail Offline Outlets by Channel: % Unit Growth 2017-2022

Table 22 - Retail GBO Company Shares: % Value 2018-2022

Table 23 - Retail GBN Brand Shares: % Value 2019-2022

Table 24 - Retail Offline GBO Company Shares: % Value 2018-2022

Table 25 - Retail Offline GBN Brand Shares: % Value 2019-2022

Table 26 - Retail Offline LBN Brand Shares: Outlets 2019-2022

Table 27 - Retail E-Commerce GBO Company Shares: % Value 2018-2022

Table 28 - Retail E-Commerce GBN Brand Shares: % Value 2019-2022

Table 29 - Forecast Sales in Retail by Retail Offline vs Retail E-Commerce: Value 2022-2027

Table 30 - Forecast Sales in Retail by Retail Offline vs Retail E-Commerce: % Value Growth 2022-2027

Table 31 - Forecast Sales in Retail Offline by Channel: Value 2022-2027

Table 32 - Forecast Sales in Retail Offline by Channel: % Value Growth 2022-2027

Table 33 - Forecast Retail Offline Outlets by Channel: Units 2022-2027

Table 34 - Forecast Retail Offline Outlets by Channel: % Unit Growth 2022-2027

## DISCLAIMER

## SOURCES

Summary 1 - 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.

For more information on this report, further enquiries can be directed via this link [www.euromonitor.com/grocery-retailers-in-estonia/report](http://www.euromonitor.com/grocery-retailers-in-estonia/report).