



Euromonitor
International

Wine in Estonia

July 2025

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KEY DATA FINDINGS

2024 DEVELOPMENTS

Elevated cost-of-living pressures continue to depress overall demand for wine
Premiumisation evident in new launches despite challenging trading conditions
Supermarkets and hypermarkets remain the leading retail distribution channels

PROSPECTS AND OPPORTUNITIES

Wine consumption set to recover from 2025
Level of new product development expected to remain high
More producers likely to introduce canned and bag-in-box wines

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Alcoholic Drinks in Estonia - Industry Overview

EXECUTIVE SUMMARY

Alcoholic drinks in 2024: The big picture
2024 key trends
Competitive landscape
Retail 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

OPERATING ENVIRONMENT

Contraband/parallel trade
Duty free
Cross-border/private imports

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