



Coffee in Estonia

December 2025

Table of Contents

Coffee in Estonia - Category analysis

KEY DATA FINDINGS

2025 DEVELOPMENTS

Premiumisation and convenience shape coffee consumption

INDUSTRY PERFORMANCE

Declining demand amid economic pressures

Fresh ground coffee pods benefit from enduring demand for indulgent experiences

WHAT'S NEXT?

Moderate value growth for coffee, driven by premiumisation

Product innovation to centre on flavours

Expected decline in instant coffee consumption

COMPETITIVE LANDSCAPE

Paulig continues to hold competitive edge, thanks to its strong heritage

Gurmans and Lidl benefit from growing consumer demand for premium and value-for-money offerings

CHANNELS

Modern grocery chains dominate coffee sales

E-commerce sees strongest performance

CATEGORY DATA

Table 1 - Retail Sales of Coffee by Category: Volume 2020-2025

Table 2 - Retail Sales of Coffee by Category: Value 2020-2025

Table 3 - Retail Sales of Coffee by Category: % Volume Growth 2020-2025

Table 4 - Retail Sales of Coffee by Category: % Value Growth 2020-2025

Table 5 - NBO Company Shares of Coffee: % Retail Value 2021-2025

Table 6 - LBN Brand Shares of Coffee: % Retail Value 2022-2025

Table 7 - Forecast Retail Sales of Coffee by Category: Volume 2025-2030

Table 8 - Forecast Retail Sales of Coffee by Category: Value 2025-2030

Table 9 - Forecast Retail Sales of Coffee by Category: % Volume Growth 2025-2030

Table 10 - Forecast Retail Sales of Coffee by Category: % Value Growth 2025-2030

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Hot Drinks in Estonia - Industry Overview

EXECUTIVE SUMMARY

Inflation drives value growth amid declining demand

KEY DATA FINDINGS

INDUSTRY PERFORMANCE

Inflationary pressures drive value growth amid declining demand

Sharp increases in global coffee prices hinder consumption

Fruit/herbal tea remains significant

WHAT'S NEXT?

Hot drinks set to rebound amid economic recovery

Growing demand for indulgent coffee experiences

Tea and other hot drinks will remain niche categories

COMPETITIVE LANDSCAPE

Paulig leads hot drinks sales

Starbucks expands from low base

CHANNELS

Supermarkets and hypermarkets lead sales

Lidl drives growth of discounters

Foodservice vs retail split

MARKET DATA

Table 11 - Sales of Hot Drinks by Retail vs Foodservice: % Volume Breakdown 2020-2025

Table 12 - Sales of Hot Drinks by Retail vs Foodservice: % Volume Growth 2020-2025

Table 13 - Retail Sales of Hot Drinks by Category: Volume 2020-2025

Table 14 - Retail Sales of Hot Drinks by Category: Value 2020-2025

Table 15 - Retail Sales of Hot Drinks by Category: % Volume Growth 2020-2025

Table 16 - Retail Sales of Hot Drinks by Category: % Value Growth 2020-2025

Table 17 - Foodservice Sales of Hot Drinks by Category: Volume 2020-2025

Table 18 - Foodservice Sales of Hot Drinks by Category: % Volume Growth 2020-2025

Table 19 - Total Sales of Hot Drinks by Category: Total Volume 2020-2025

Table 20 - Total Sales of Hot Drinks by Category: % Total Volume Growth 2020-2025

Table 21 - NBO Company Shares of Hot Drinks: % Retail Value 2021-2025

Table 22 - LBN Brand Shares of Hot Drinks: % Retail Value 2022-2025

Table 23 - Penetration of Private Label in Hot Drinks by Category: % Retail Value 2020-2025

Table 24 - Retail Distribution of Hot Drinks by Format: % Volume 2020-2025

Table 25 - Retail Distribution of Hot Drinks by Format and Category: % Volume 2025

Table 26 - Forecast Sales of Hot Drinks by Retail vs Foodservice: % Volume Breakdown 2025-2030

Table 27 - Forecast Sales of Hot Drinks by Retail vs Foodservice: % Volume Growth 2025-2030

Table 28 - Forecast Retail Sales of Hot Drinks by Category: Volume 2025-2030

Table 29 - Forecast Retail Sales of Hot Drinks by Category: Value 2025-2030

Table 30 - Forecast Retail Sales of Hot Drinks by Category: % Volume Growth 2025-2030

Table 31 - Forecast Retail Sales of Hot Drinks by Category: % Value Growth 2025-2030

Table 32 - Forecast Foodservice Sales of Hot Drinks by Category: Volume 2025-2030

Table 33 - Forecast Foodservice Sales of Hot Drinks by Category: % Volume Growth 2025-2030

Table 34 - Forecast Total Sales of Hot Drinks by Category: Total Volume 2025-2030

Table 35 - Forecast Total Sales of Hot Drinks by Category: % Total Volume Growth 2025-2030

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SOURCES

Summary 1 - Research Sources

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