



Euromonitor
International

Alcoholic Drinks in Estonia

August 2026

Table of Contents

EXECUTIVE SUMMARY

2025 Developments

KEY DATA INSIGHTS

INDUSTRY PERFORMANCE

Excise-Driven Choices Force Consumers to Trade Down or Premiumise

Chart 1 - Cold summer of 2025 hampers sales

Beer Remains Dominant as RtDs Attract a New Generation

Vodka and Brandy Lose Ground as Lighter and Mixed Drinks Gain Appeal

Chart 2 - Volume Sales 2020-2030

Chart 3 - Volume Sales by Category 2025

WHAT'S NEXT?

Health-Focused Consumers Shift Towards Lighter and Premium Choices

Younger Adult Drinkers Drive Demand for Innovative Lighter Beverages

Producers Innovate to Balance Health Trends and Value Pressures

Chart 4 - Forecast Volume Sales 2020-2030

Chart 5 - Forecast Volume Sales by Category 2025-2030

COMPETITIVE LANDSCAPE

A Le Coq and Saku Õllethase Defend Their Lead as Private Label Gains Traction

Chart 6 - Company Shares 2025

Chart 7 - Brand Shares 2025

CHANNELS

Discounters Attract Value-Seeking Shoppers as E-Commerce Lags

Weather and Tax Hikes Drive Shift From Horeca to Retail

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

ECONOMIC CONTEXT

Chart 8 - Economic Context for Alcoholic Drinks

Chart 9 - Real Gdp Growth 2020-2030

Chart 10 - Inflation 2020-2030

CONSUMER CONTEXT

Chart 11 - Consumer Context for Alcoholic Drinks

Chart 12 - Population 2020-2030

Chart 13 - Population by Generation 2025

COUNTRY REPORTS DISCLAIMER

[Beer in Estonia](#)

KEY DATA INSIGHTS

2025 DEVELOPMENTS

Beer Summary

INDUSTRY PERFORMANCE

Beer Companies Adapt Offerings as Consumers Shift Away From Mid-Priced Beer
Younger Adults Drive Non Alcoholic Beer as Health and Wellness Influences Demand

Chart 14 - Non alcoholic beer aligns with healthier living patterns

Imported Brands Leverage Polarisation to Sustain Growth Amid Volume Decline

Chart 15 - Volume Sales 2020-2030

Chart 16 - Volume Sales by Category 2025

WHAT'S NEXT?

Local Producers Retain Dominance as Demand Stagnates

Craft Ales and Premium Lagers Generate Value Amid Falling Volumes

Health Awareness Reshapes Consumer Choice and Value

Chart 17 - Forecast Volume Sales 2020-2030

Chart 18 - Forecast Volume Sales by Category 2025-2030

COMPETITIVE LANDSCAPE

A Le Coq and Saku Õlletehase Defend Dominance as Private Label Rises

Chart 19 - Company Shares 2025

Chart 20 - Brand Shares 2025

CHANNELS

Rimi and Maxima Boost Summer Beer Sales with In-Store Promotions

Discounters Attract Value-Seekers as Price Sensitivity Rises

E-Commerce Lags as Brick-And-Mortar Giants Defend Beer Sales

ECONOMIC CONTEXT

Chart 21 - Economic Context for Beer

Chart 22 - Real Gdp Growth 2020-2030

Chart 23 - Inflation 2020-2030

CONSUMER CONTEXT

Chart 24 - Consumer Context for Beer

Chart 25 - Population 2020-2030

Chart 26 - Population by Generation 2025

COUNTRY REPORTS DISCLAIMER

[Cider/Perry in Estonia](#)

KEY DATA INSIGHTS

2025 DEVELOPMENTS

Cider/Perry Summary

INDUSTRY PERFORMANCE

Leading Brands Fuel Flavour-Driven Competition as Seasonal Consumption Drops

Chart 27 - Cold summer curbs summer social events and drinking occasions

Kopparberg and Rekorderlig Expand Appeal with Exotic Flavours

Chart 28 - Exotic flavours are used to sustain appeal and attract consumers

Chart 29 - Volume Sales 2020-2030

Chart 30 - Volume Sales by Category 2025

WHAT'S NEXT?

Suppliers Focus on Flavour Variety as Volume Stabilises after Decline

Economic Recovery and Seasonal Effects Shape Demand Fluctuations

Chart 31 - Forecast Volume Sales 2020-2030

Chart 32 - Forecast Volume Sales by Category 2025-2030

COMPETITIVE LANDSCAPE

Somersby and Kopparberg Drive Competitive Shifts with Flavour Focus

Chart 33 - Company Shares 2025

Chart 34 - Brand Shares 2025

CHANNELS

Rimi, Maxima and Prisma Expand Reach with Broad Cider Assortments

Discounters Challenge E-Commerce as Price Sensitivity Rises

ECONOMIC CONTEXT

Chart 35 - Economic Context for Cider/Perry

Chart 36 - Real Gdp Growth 2020-2030

Chart 37 - Inflation 2020-2030

CONSUMER CONTEXT

Chart 38 - Consumer Context for Cider/Perry

Chart 39 - Population 2020-2030

Chart 40 - Population by Generation 2025

COUNTRY REPORTS DISCLAIMER

[Rtds in Estonia](#)

KEY DATA INSIGHTS

2025 DEVELOPMENTS

Rtds Summary

INDUSTRY PERFORMANCE

Younger Adults Change First-Time Alcohol Choices From Beer to Long Drinks

Chart 41 - Flavour experimentation is common in RTDs

A Le Coq G:N and Hartwall Capture Young Adults with Classic and Exotic Flavours

Flavour Polarisation and Innovation Make Rtds a First-Choice for New Adult Drinkers

Chart 42 - Polarisation between long drinks and cocktails

Chart 43 - Volume Sales 2020-2030

Chart 44 - Volume Sales by Category 2025

WHAT'S NEXT?

A Le Coq and Carlsberg Shape Growth through Innovation

Barefoot and Le Petit Étoilé Drive Rapid Gains with Wine-Based Blends

Chart 45 - Forecast Volume Sales 2020-2030

Chart 46 - Forecast Volume Sales by Category 2025-2030

COMPETITIVE LANDSCAPE

Saku Õlletehase and a Le Coq Drive Share Gains through Portfolio Strength

Chart 47 - Company Shares 2025

Chart 48 - Brand Shares 2025

CHANNELS

Rimi and Maxima Sustain Their Lead by Offering a Broad Assortment of Rtds

Discounters Challenge Online Growth by Meeting Value Demand

ECONOMIC CONTEXT

Chart 49 - Economic Context for Rtds

Chart 50 - Real Gdp Growth 2020-2030

Chart 51 - Inflation 2020-2030

CONSUMER CONTEXT

Chart 52 - Consumer Context for Rtds

Chart 53 - Population 2020-2030

Chart 54 - Population by Generation 2025

COUNTRY REPORTS DISCLAIMER

[Spirits in Estonia](#)

KEY DATA INSIGHTS

2025 DEVELOPMENTS

Spirits Summary

INDUSTRY PERFORMANCE

Players Embrace Flavour Experimentation to Drive Cocktail Consumption

Chart 55 - Flavours are expanding to align with mixing cocktails

Non Alcoholic Gin Brands Struggle as Consumers Seek Alternatives

Chart 56 - Non-alcoholic spirits have a limited presence

Cold Weather Reduces Demand for Bitters and Gin-Based Cocktails

Chart 57 - Volume Sales 2020-2030

Chart 58 - Volume Sales by Category 2025

WHAT'S NEXT?

Mixing Trends to Support Rum and American Whiskey

Younger Adults Prioritise Wellness, Driving Premium and Flavour Innovation

Chart 59 - Forecast Volume Sales 2020-2030

Chart 60 - Forecast Volume Sales by Category 2025-2030

COMPETITIVE LANDSCAPE

Liviko as Leverages Vana Tallinn Expansion to Sustain Lead Amid Declining Share

Chart 61 - Company Shares 2025

Chart 62 - Brand Shares 2025

CHANNELS

Rimi and Maxima Drive Spirits Sales with Wide Assortments and Local Reach

Discounters Capture Value-Seeking Shoppers as E-Commerce Struggles to Break through

ECONOMIC CONTEXT

Chart 63 - Economic Context for Spirits

Chart 64 - Real Gdp Growth 2020-2030

Chart 65 - Inflation 2020-2030

CONSUMER CONTEXT

Chart 66 - Consumer Context for Spirits

Chart 67 - Population 2020-2030

Chart 68 - Population by Generation 2025

COUNTRY REPORTS DISCLAIMER

[Wine in Estonia](#)

KEY DATA INSIGHTS

2025 DEVELOPMENTS

Wine Summary

INDUSTRY PERFORMANCE

Cold Weather and Tax Rises Drive Sales Down as White Wine Outperforms

Demand for Lighter Indulgence Boosts White Wine as Still Grape Leads in Volume

Chart 69 - White wine is winning over red one

Chart 70 - Volume Sales 2020-2030

Chart 71 - Volume Sales by Category 2025

WHAT'S NEXT?

Younger Adults Embrace Lighter Wines as White Gains Share

Retailers and Brands Respond to Evolving Demand with Innovation

Chart 72 - Forecast Volume Sales 2020-2030

Chart 73 - Forecast Volume Sales by Category 2025-2030

COMPETITIVE LANDSCAPE

Henkell Freixenet Strengthens Its Lead in Sparkling Wine

Chart 74 - Mionetto Prosecco Holds Position in Sparkling Wine

Chart 75 - Company Shares 2025

Chart 76 - Brand Shares 2025

CHANNELS

Rimi and Maxima Expand Reach as Supermarkets Maintain Dominance

Prisma and Selver Reinforce E-Commerce While Offline Rivals Hold Ground

ECONOMIC CONTEXT

Chart 77 - Economic Context for Wine

Chart 78 - Real Gdp Growth 2020-2030

Chart 79 - Inflation 2020-2030

CONSUMER CONTEXT

Chart 80 - Consumer Context for Wine

Chart 81 - Population 2020-2030

Chart 82 - Population by Generation 2025

COUNTRY REPORTS DISCLAIMER

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/alcoholic-drinks-in-estonia/report.