



# Passport

## Beer in Estonia

Euromonitor International

August 2022

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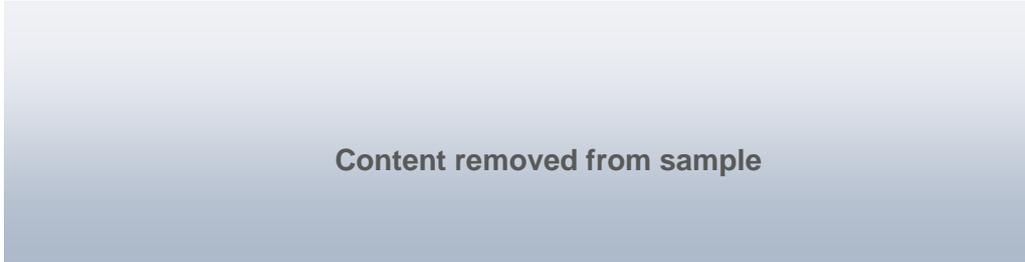
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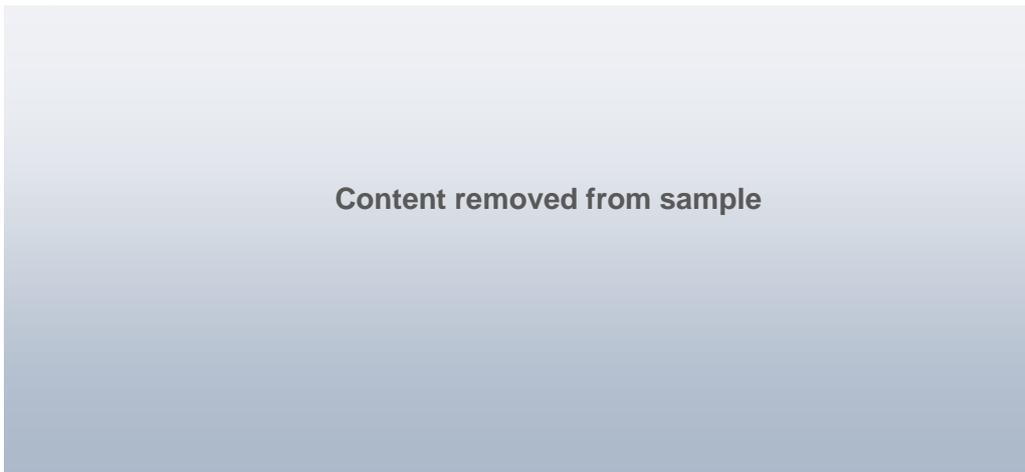
# BEER IN ESTONIA - CATEGORY ANALYSIS

## KEY DATA FINDINGS

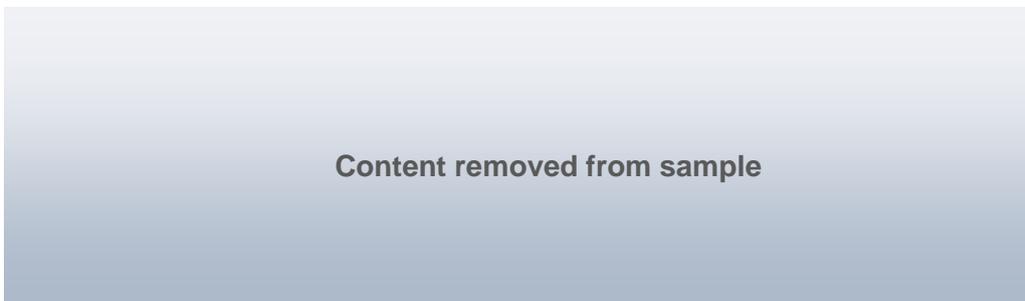


## 2021 DEVELOPMENTS

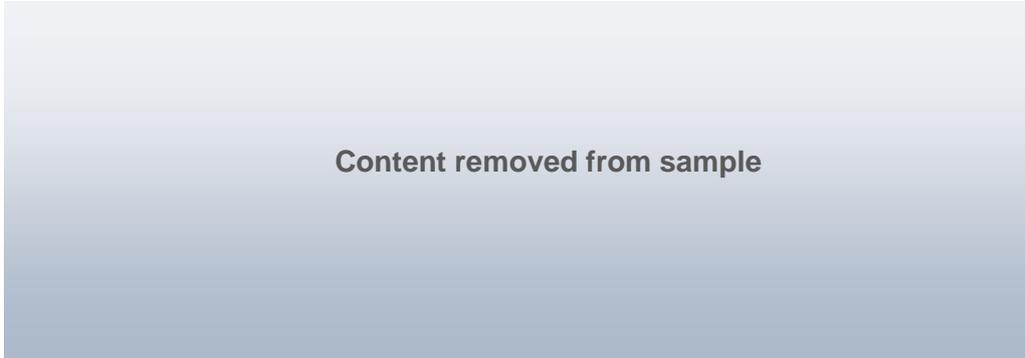
Lager remains dominant but craft beer continues to find favour



Growing focus on healthier lifestyles boosting demand for non alcoholic beer

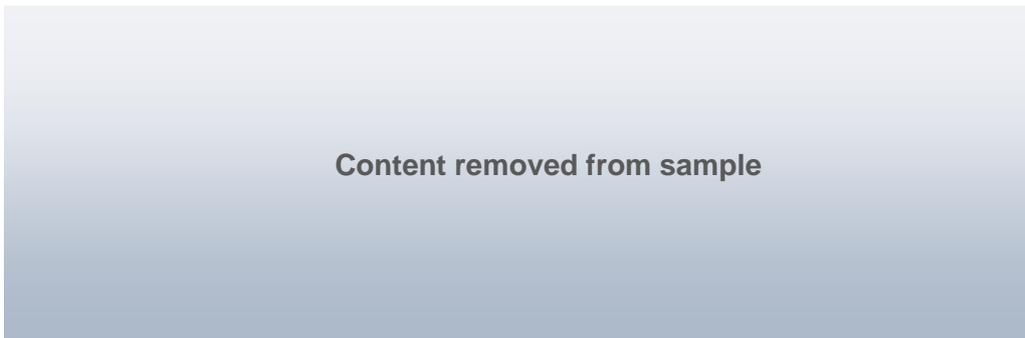


### Lidl finally enters Estonia

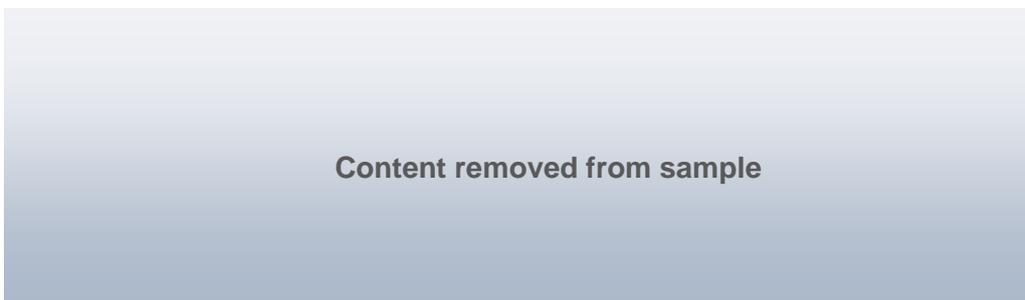


## PROSPECTS AND OPPORTUNITIES

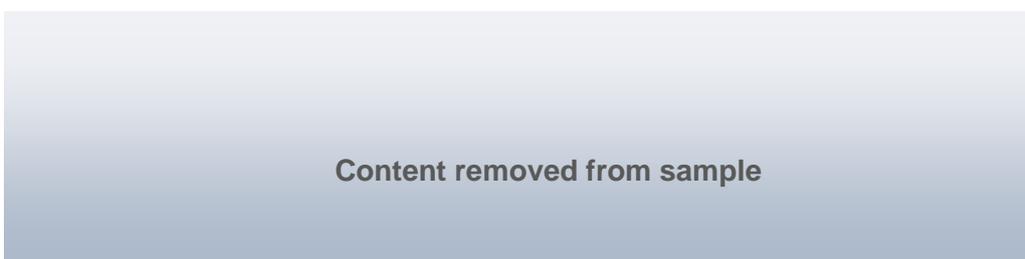
### Sustainability concerns enter beer



### Non alcoholic beer set to attract more drinkers moving forward



### A Le Coq set to benefit from new agreement to sell Corona beer



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## CATEGORY BACKGROUND

### Lager price band methodology

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#### Summary 1 Lager by Price Band 2021

[Redacted content]

[Redacted content]

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources  
Note: Price bands for lager are based primarily on price, but positioning and packaging are other factors that are considered in classification

#### Summary 2 Number of Breweries 2016-2021

[Redacted content]

Source: Euromonitor International

## CATEGORY DATA

### Table 1 Sales of Beer by Category: Total Volume 2016-2021

million litres

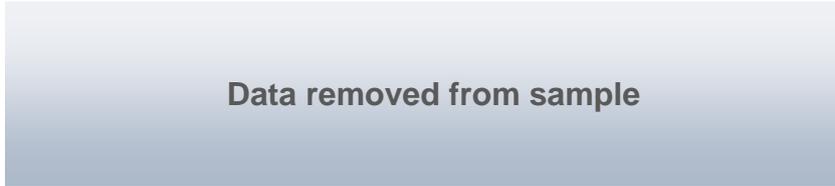
	2016	2017	2018	2019	2020	2021
Dark Beer	<b>Data removed from sample</b>					
- Ale						
- Sorghum						
- Weissbier/Weizen/ Wheat Beer						
Lager						
- Flavoured/Mixed Lager						
- Standard Lager						
-- Premium Lager						
--- Domestic Premium Lager						
--- Imported Premium Lager						
-- Mid-Priced Lager						
--- Domestic Mid-Priced Lager						
--- Imported Mid-Priced Lager						
-- Economy Lager						
--- Domestic Economy Lager						
--- Imported Economy Lager						
Non/Low Alcohol Beer						
- Low Alcohol Beer						
- Non Alcoholic Beer						
Stout						
Beer						

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

**Table 2 Sales of Beer by Category: Total Value 2016-2021**

EUR million	2016	2017	2018	2019	2020	2021
Dark Beer	<b>Data removed from sample</b>					
- Ale						
- Sorghum						
- Weissbier/Weizen/ Wheat Beer						
Lager						
- Flavoured/Mixed Lager						
- Standard Lager						
-- Premium Lager						
--- Domestic Premium Lager						
--- Imported Premium Lager						
-- Mid-Priced Lager						
--- Domestic Mid-Priced Lager						
--- Imported Mid-Priced Lager						
-- Economy Lager						
--- Domestic Economy Lager						

- Imported Economy Lager
- Non/Low Alcohol Beer
- Low Alcohol Beer
- Non Alcoholic Beer
- Stout
- Beer



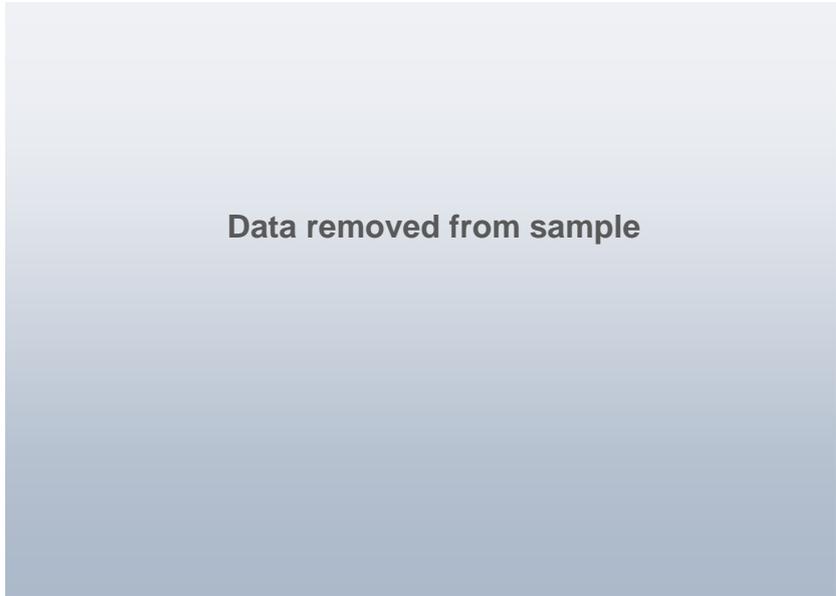
Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

**Table 3 Sales of Beer by Category: % Total Volume Growth 2016-2021**

% total volume growth

2020/21      2016-21 CAGR      2016/21 Total

- Dark Beer
- Ale
- Sorghum
- Weissbier/Weizen/Wheat Beer
- Lager
- Flavoured/Mixed Lager
- Standard Lager
- Premium Lager
- Domestic Premium Lager
- Imported Premium Lager
- Mid-Priced Lager
- Domestic Mid-Priced Lager
- Imported Mid-Priced Lager
- Economy Lager
- Domestic Economy Lager
- Imported Economy Lager
- Non/Low Alcohol Beer
- Low Alcohol Beer
- Non Alcoholic Beer
- Stout
- Beer



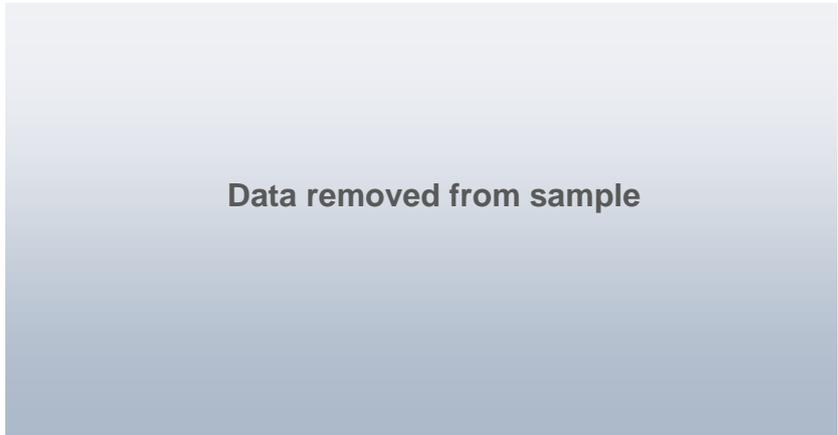
Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

**Table 4 Sales of Beer by Category: % Total Value Growth 2016-2021**

% local currency, current value growth

2020/21      2016-21 CAGR      2016/21 Total

- Dark Beer
- Ale
- Sorghum
- Weissbier/Weizen/Wheat Beer
- Lager
- Flavoured/Mixed Lager
- Standard Lager
- Premium Lager
- Domestic Premium Lager
- Imported Premium Lager
- Mid-Priced Lager
- Domestic Mid-Priced Lager



--- Imported Mid-Priced Lager  
 -- Economy Lager  
 --- Domestic Economy Lager  
 --- Imported Economy Lager  
 Non/Low Alcohol Beer  
 - Low Alcohol Beer  
 - Non Alcoholic Beer  
 Stout  
 Beer

**Data removed from sample**

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

**Table 5 Sales of Beer by Off-trade vs On-trade: Volume 2016-2021**

million litres

	2016	2017	2018	2019	2020	2021
Off-trade	<b>Data removed from sample</b>					
On-trade						
Total						

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

**Table 6 Sales of Beer by Off-trade vs On-trade: Value 2016-2021**

EUR million

	2016	2017	2018	2019	2020	2021
Off-trade	<b>Data removed from sample</b>					
On-trade						
Total						

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

**Table 7 Sales of Beer by Off-trade vs On-trade: % Volume Growth 2016-2021**

% volume growth

	2020/21	2016-21 CAGR	2016/21 Total
Off-trade	<b>Data removed from sample</b>		
On-trade			
Total			

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

**Table 8 Sales of Beer by Off-trade vs On-trade: % Value Growth 2016-2021**

% current value growth

	2020/21	2016-21 CAGR	2016/21 Total
Off-trade	<b>Data removed from sample</b>		
On-trade			
Total			

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

**Table 9** GBO Company Shares of Beer: % Total Volume 2017-2021

% total volume Company	2017	2018	2019	2020	2021
---------------------------	------	------	------	------	------

**Data removed from sample**

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

**Table 10** NBO Company Shares of Beer: % Total Volume 2017-2021

% total volume Company	2017	2018	2019	2020	2021
---------------------------	------	------	------	------	------

**Data removed from sample**

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

**Table 11 LBN Brand Shares of Beer: % Total Volume 2018-2021**

% total volume Brand (Global Brand Owner)	Company	2018	2019	2020	2021
---	---------	------	------	------	------

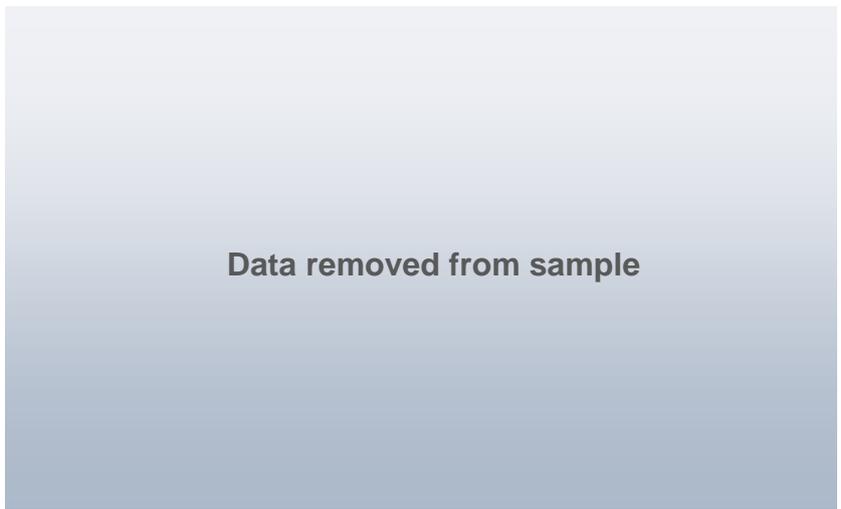


Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

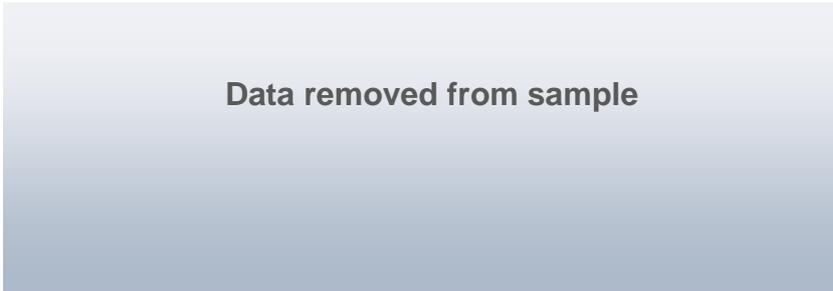
**Table 12 Forecast Sales of Beer by Category: Total Volume 2021-2026**

million litres	2021	2022	2023	2024	2025	2026
----------------	------	------	------	------	------	------

- Dark Beer
- Ale
- Sorghum
- Weissbier/Weizen/  
Wheat Beer
- Lager
- Flavoured/Mixed Lager
- Standard Lager
- Premium Lager
- Domestic Premium  
Lager
- Imported Premium  
Lager
- Mid-Priced Lager
- Domestic Mid-Priced  
Lager
- Imported Mid-Priced



- Lager
- Economy Lager
- Domestic Economy Lager
- Imported Economy Lager
- Non/Low Alcohol Beer
- Low Alcohol Beer
- Non Alcoholic Beer
- Stout
- Beer



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

**Table 13 Forecast Sales of Beer by Category: Total Value 2021-2026**

EUR million

	2021	2022	2023	2024	2025	2026
Dark Beer	Data removed from sample					
- Ale						
- Sorghum						
- Weissbier/Weizen/Wheat Beer						
Lager						
- Flavoured/Mixed Lager						
- Standard Lager						
-- Premium Lager						
--- Domestic Premium Lager						
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-- Mid-Priced Lager						
--- Domestic Mid-Priced Lager						
--- Imported Mid-Priced Lager						
-- Economy Lager						
--- Domestic Economy Lager						
--- Imported Economy Lager						
Non/Low Alcohol Beer						
- Low Alcohol Beer						
- Non Alcoholic Beer						
Stout						
Beer						

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

**Table 14 Forecast Sales of Beer by Category: % Total Volume Growth 2021-2026**

% total volume growth

	2021/22	2021-26 CAGR	2021/26 Total
Dark Beer	Data removed from sample		
- Ale			

- Sorghum
- Weissbier/Weizen/Wheat Beer
- Lager
- Flavoured/Mixed Lager
- Standard Lager
- Premium Lager
- Domestic Premium Lager
- Imported Premium Lager
- Mid-Priced Lager
- Domestic Mid-Priced Lager
- Imported Mid-Priced Lager
- Economy Lager
- Domestic Economy Lager
- Imported Economy Lager
- Non/Low Alcohol Beer
- Low Alcohol Beer
- Non Alcoholic Beer
- Stout
- Beer



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

**Table 15 Forecast Sales of Beer by Category: % Total Value Growth 2021-2026**

% local currency, constant value growth

	2021/2022	2021-26 CAGR	2021/26 Total
Dark Beer			
- Ale			
- Sorghum			
- Weissbier/Weizen/Wheat Beer			
Lager			
- Flavoured/Mixed Lager			
- Standard Lager			
-- Premium Lager			
--- Domestic Premium Lager			
--- Imported Premium Lager			
-- Mid-Priced Lager			
--- Domestic Mid-Priced Lager			
--- Imported Mid-Priced Lager			
-- Economy Lager			
--- Domestic Economy Lager			
--- Imported Economy Lager			
Non/Low Alcohol Beer			
- Low Alcohol Beer			
- Non Alcoholic Beer			
Stout			
Beer			

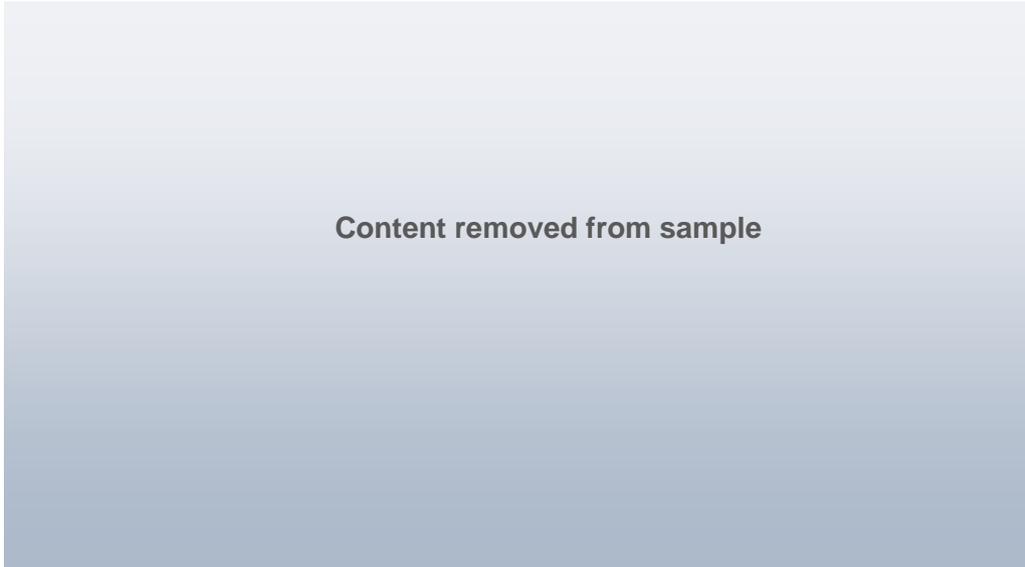


Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

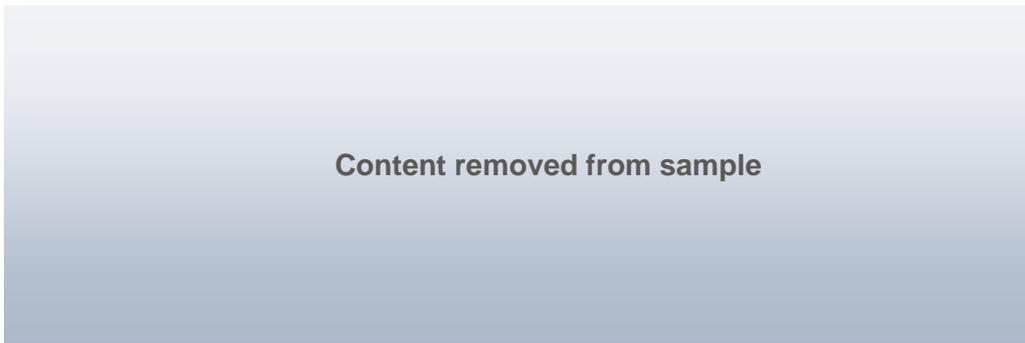
# ALCOHOLIC DRINKS IN ESTONIA - INDUSTRY OVERVIEW

## EXECUTIVE SUMMARY

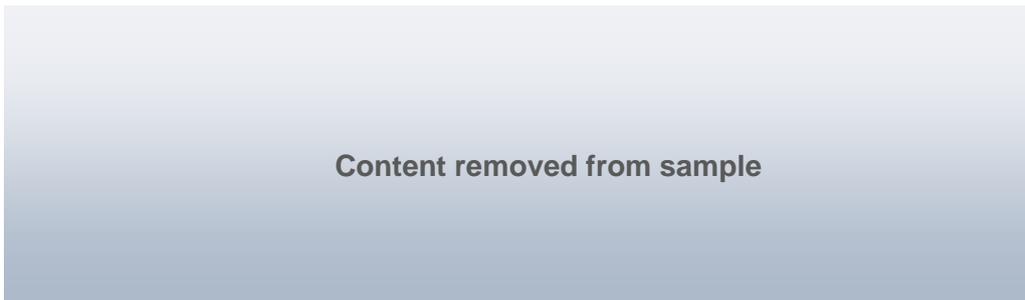
### Alcoholic drinks in 2021: The big picture

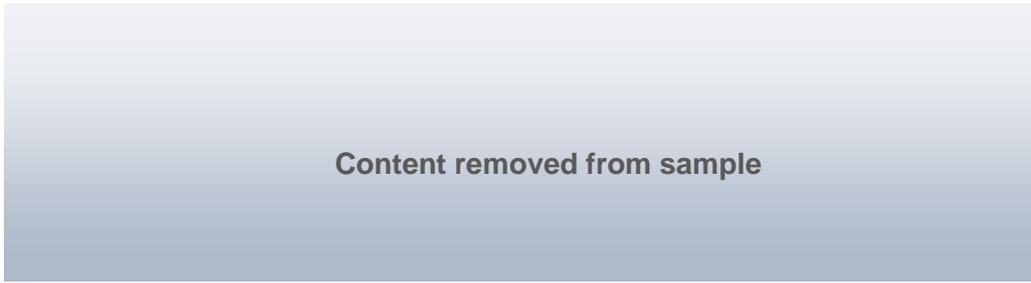


### 2021 key trends

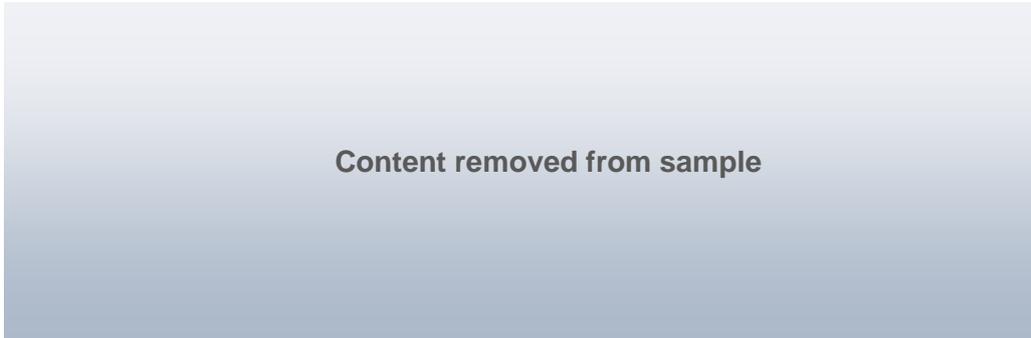


### Competitive landscape

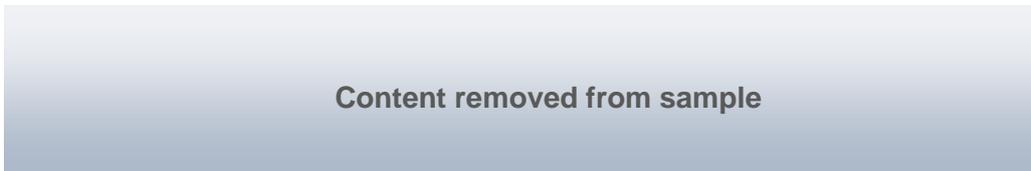




Retailing developments



On-trade vs off-trade split



What next for alcoholic drinks?



## MARKET BACKGROUND

### Legislation

Legal purchasing age and legal drinking age

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### Drink driving

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### Advertising

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### Smoking ban

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### Opening hours

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### On-trade establishments

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## TAXATION AND DUTY LEVIES

- The Estonian government did not make any changes to taxation and duty levies on alcoholic drinks in 2021. However, in July 2019 excise duty rates on beer, cider/perry and spirits were reduced by 25% in an effort to curb cross-border trade with this continuing to benefit sales.

### Summary 3 Taxation and Duty Levies on Alcoholic Drinks 2021

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Source: Euromonitor International

## OPERATING ENVIRONMENT

### Contraband/parallel trade

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### Duty free

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### Cross-border/private imports

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## KEY NEW PRODUCT LAUNCHES

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## Outlook

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## MARKET INDICATORS

Table 16 Retail Consumer Expenditure on Alcoholic Drinks 2016-2021

EUR million

	2016	2017	2018	2019	2020	2021
--	------	------	------	------	------	------

Total

Data removed from sample

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

Note: 2021 data is forecast

## MARKET DATA

Table 17 Sales of Alcoholic Drinks by Category: Total Volume 2016-2021

	2016	2017	2018	2019	2020	2021
--	------	------	------	------	------	------

Beer (million litres)  
Cider/Perry ('000 litres)  
RTDs ('000 litres)  
Spirits ('000 litres)  
Wine (million litres)  
Alcoholic Drinks  
(million litres)

Data removed from sample

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

Table 18 Sales of Alcoholic Drinks by Category: Total Value 2016-2021

EUR million

	2016	2017	2018	2019	2020	2021
--	------	------	------	------	------	------

Beer  
Cider/Perry  
RTDs  
Spirits  
Wine  
Alcoholic Drinks

Data removed from sample

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

**Table 19 Sales of Alcoholic Drinks by Category: % Total Volume Growth 2016-2021**

% total volume growth

	2020/21	2016-21 CAGR	2016/21 Total
Beer	<b>Data removed from sample</b>		
Cider/Perry			
RTDs			
Spirits			
Wine			
Alcoholic Drinks			

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

**Table 20 Sales of Alcoholic Drinks by Category: % Total Value Growth 2016-2021**

% local currency, current value growth

	2020/21	2016-21 CAGR	2016/21 Total
Beer	<b>Data removed from sample</b>		
Cider/Perry			
RTDs			
Spirits			
Wine			
Alcoholic Drinks			

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

**Table 21 Sales of Alcoholic Drinks by Category by Off-trade vs On-trade: Volume 2021**

	Off-trade	On-trade	Total
Beer (million litres)	<b>Data removed from sample</b>		
Cider/Perry ('000 litres)			
RTDs ('000 litres)			
Spirits ('000 litres)			
Wine (million litres)			
Alcoholic Drinks (million litres)			

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

**Table 22 Sales of Alcoholic Drinks by Category by Off-trade vs On-trade: Value 2021**

EUR million

	Off-trade	On-trade	Total
Beer	<b>Data removed from sample</b>		
Cider/Perry			
RTDs			
Spirits			
Wine			
Alcoholic Drinks			

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

**Table 23 Sales of Alcoholic Drinks by Category by Off-trade vs On-trade: % Volume 2021**

% volume analysis

	Off-trade	On-trade	Total
Beer	<b>Data removed from sample</b>		
Cider/Perry			
RTDs			
Spirits			
Wine			
Alcoholic Drinks			

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

**Table 24 Sales of Alcoholic Drinks by Category by Off-trade vs On-trade: % Value 2021**

% value analysis

	Off-trade	On-trade	Total
Beer	<b>Data removed from sample</b>		
Cider/Perry			
RTDs			
Spirits			
Wine			
Alcoholic Drinks			

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

**Table 25 GBO Company Shares of Alcoholic Drinks: % Total Volume 2017-2021**

% total volume

Company	2017	2018	2019	2020	2021
<b>Data removed from sample</b>					

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

**Table 26** Distribution of Alcoholic Drinks by Format: % Off-trade Value 2016-2021

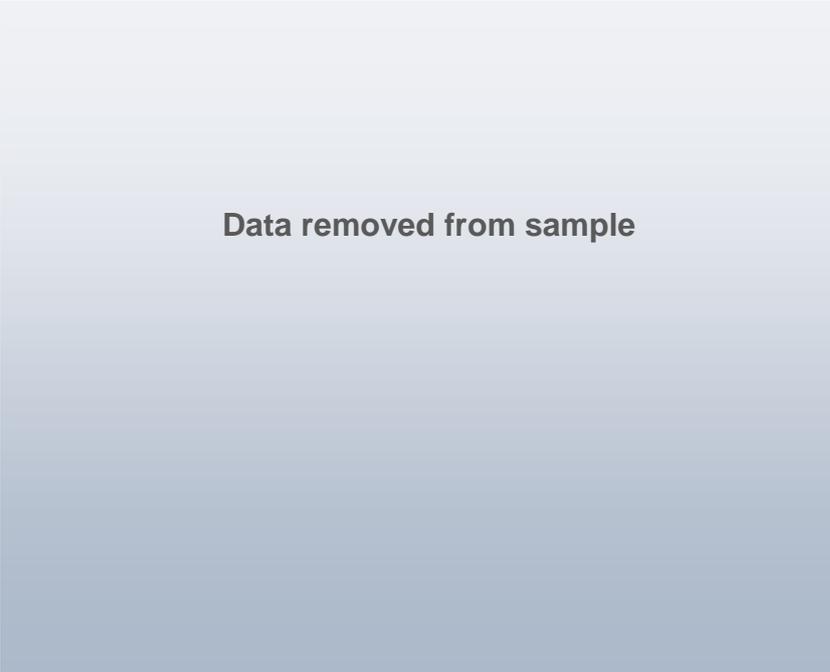
% off-trade	2016	2017	2018	2019	2020	2021
Store-Based Retailing	<b>Data removed from sample</b>					
- Grocery Retailers						
-- Modern Grocery Retailers						
--- Convenience Stores						
--- Discounters						
--- Forecourt Retailers						
--- Hypermarkets						
--- Supermarkets						
-- Traditional Grocery Retailers						
--- Food/drink/tobacco specialists						
--- Independent Small Grocers						
--- Other Grocery Retailers						
- Non-Grocery Specialists						
-- Drugstores/parapharmacies						
-- Other Non-Grocery Alcoholic Drinks Specialists						
- Mixed Retailers						
-- Department Stores						
-- Mass Merchandisers						
-- Variety Stores						
-- Warehouse Clubs						
Non-Store Retailing						
- Direct Selling						
- Homeshopping						
- E-Commerce						
- Vending						
Total						

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

**Table 27** Distribution of Alcoholic Drinks by Format and by Category: % Off-trade Volume 2020

% off-trade	Beer	Cider/Perry	RTDs	Spirits	Wine
Store-Based Retailing	<b>Data removed from sample</b>				
- Grocery Retailers					
-- Modern Grocery Retailers					
--- Convenience Stores					
--- Discounters					
--- Forecourt Retailers					
--- Supermarkets					

- Traditional Grocery Retailers
- Food/drink/tobacco specialists
- Independent Small Grocers
- Other Grocery Retailers
- Non-Grocery Specialists
- Drugstores/parapharmacies
- Other Non-Grocery Alcoholic Drinks Specialists
- Mixed Retailers
- Department Stores
- Mass Merchandisers
- Variety Stores
- Warehouse Clubs
- Non-Store Retailing
- Direct Selling
- Homeshopping
- E-Commerce
- Vending
- Total



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

**Table 28 Forecast Sales of Alcoholic Drinks by Category: Total Volume 2021-2026**

	2021	2022	2023	2024	2025	2026
Beer (million litres)	<b>Data removed from sample</b>					
Cider/Perry ('000 litres)						
RTDs ('000 litres)						
Spirits ('000 litres)						
Wine (million litres)						
Alcoholic Drinks (million litres)						

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

**Table 29 Forecast Sales of Alcoholic Drinks by Category: Total Value 2021-2026**

EUR million	2021	2022	2023	2024	2025	2026
Beer	<b>Data removed from sample</b>					
Cider/Perry						
RTDs						
Spirits						
Wine						
Alcoholic Drinks						

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

**Table 30 Forecast Sales of Alcoholic Drinks by Category: % Total Volume Growth 2021-2026**

% total volume growth

	2021/22	2021-26 CAGR	2021/26 Total
Beer	<b>Data removed from sample</b>		
Cider/Perry			
RTDs			
Spirits			
Wine			
Alcoholic Drinks			

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

**Table 31 Forecast Sales of Alcoholic Drinks by Category: % Total Value Growth 2021-2026**

% local currency, constant value growth

	2021/2022	2021-26 CAGR	2021/26 Total
Beer	<b>Data removed from sample</b>		
Cider/Perry			
RTDs			
Spirits			
Wine			
Alcoholic Drinks			

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

**DISCLAIMER**

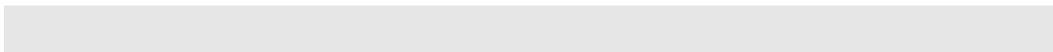
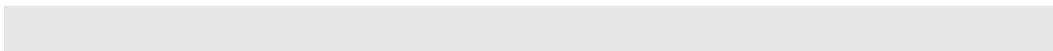
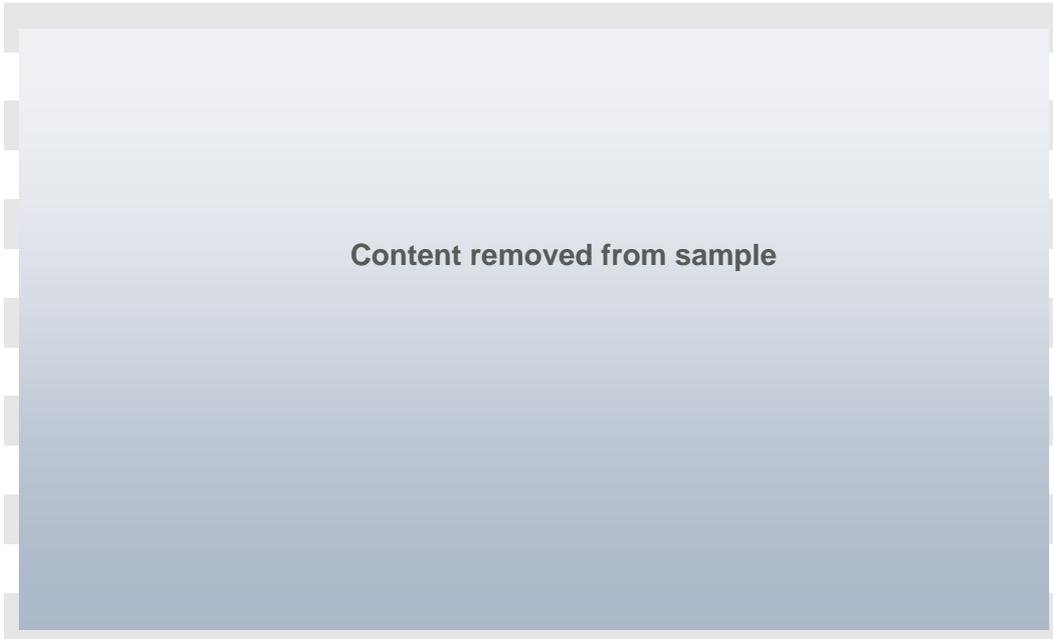
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## SOURCES

Sources used during the research included the following:

Summary 4    Research Sources

Content removed from sample



Source: Euromonitor International