



# Passport

## Drinking Milk Products in Estonia

Euromonitor International

October 2021

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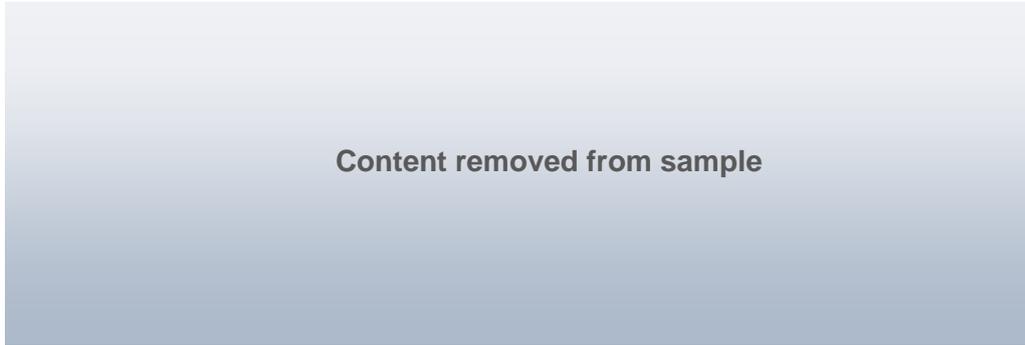
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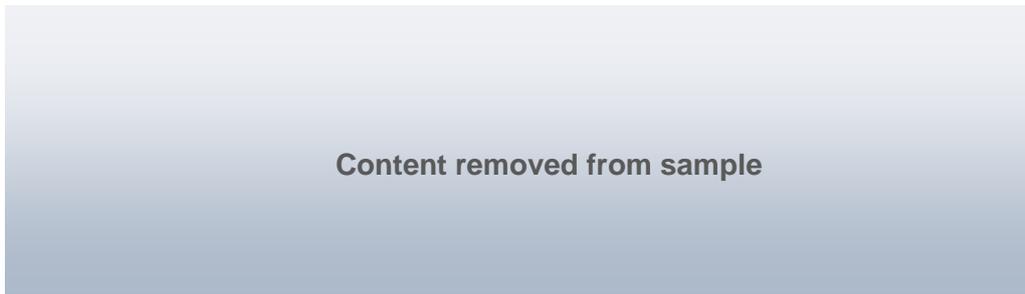
# DRINKING MILK PRODUCTS IN ESTONIA - CATEGORY ANALYSIS

## KEY DATA FINDINGS

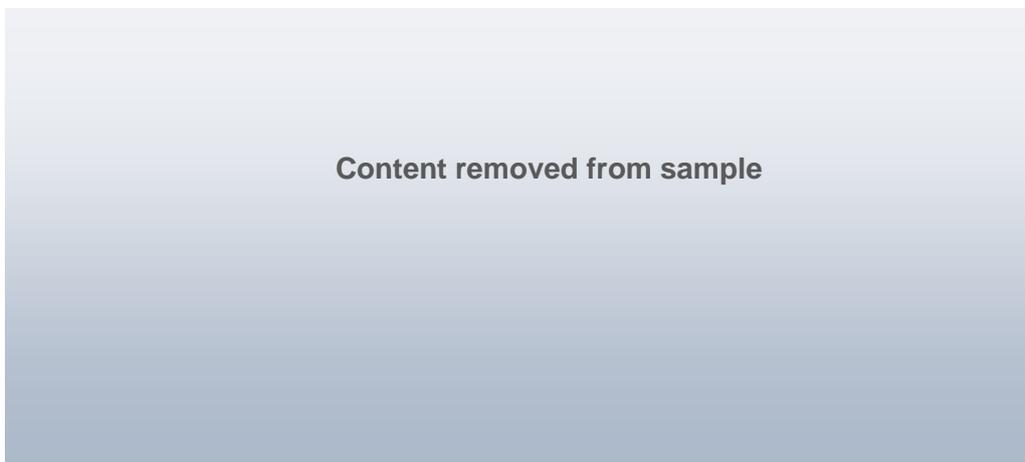


## 2021 DEVELOPMENTS

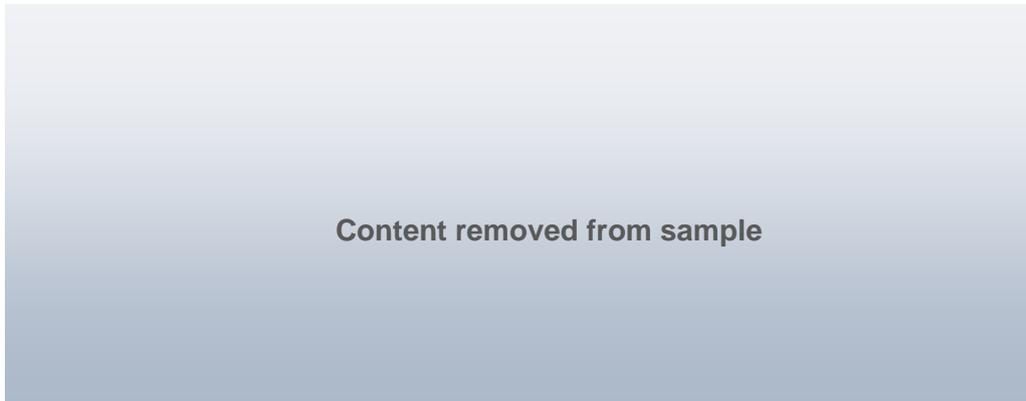
Boost for lactose-free or fortified drinking milk products thanks to increased focus on health and wellness



Despite boost from stockpiling, shelf stable milk remains A niche

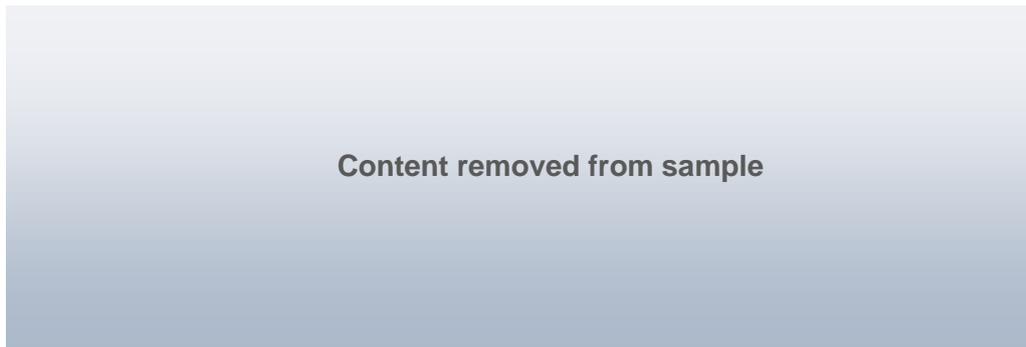


Tere will remain clear leader despite restructuring challenges

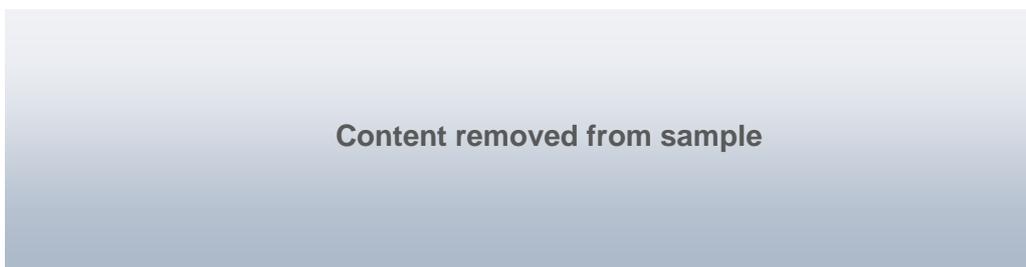


### PROSPECTS AND OPPORTUNITIES

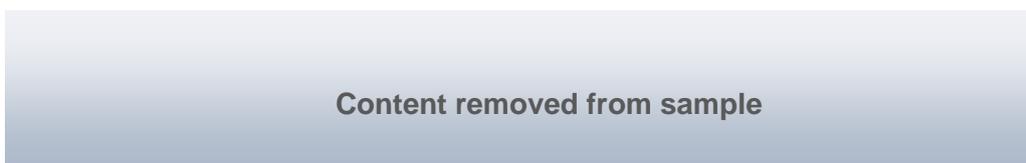
Demand for milk alternatives is expected to grow, due to increasing health awareness



Fresh milk is expected to continue to dominate into the forecast period



Rising popularity of organic products set to boost average unit prices



## CATEGORY DATA

Table 1 Sales of Drinking Milk Products by Category: Volume 2016-2021

	2016	2017	2018	2019	2020	2021
- Milk (million litres)						
--- Fresh Milk (million litres)						
---- Full Fat Fresh Milk (million litres)						
---- Semi Skimmed Fresh Milk (million litres)						
---- Fat-free Fresh Milk (million litres)						
--- Shelf Stable Milk (million litres)						
---- Full Fat Shelf Stable Milk (million litres)						
---- Semi Skimmed Shelf Stable Milk (million litres)						
---- Fat-free Shelf Stable Milk (million litres)						
-- Goat Milk (million litres)						
- Flavoured Milk Drinks (million litres)						
-- Dairy Only Flavoured Milk Drinks (million litres)						
-- Flavoured Milk Drinks with Fruit Juice (million litres)						
- Powder Milk ('000 tonnes)						
-- Soy Drinks (million litres)						
Drinking Milk Products (Not calculable)						
-- Cow's Milk (million litres)						
- Milk Alternatives (million litres)						
-- Other Milk Alternatives (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 2 Sales of Drinking Milk Products by Category: Value 2016-2021

EUR million	2016	2017	2018	2019	2020	2021
-------------	------	------	------	------	------	------

- Milk
  - Fresh Milk
    - Full Fat Fresh Milk
    - Semi Skimmed Fresh Milk
    - Fat-free Fresh Milk
  - Shelf Stable Milk
    - Full Fat Shelf Stable Milk
    - Semi Skimmed Shelf Stable Milk
    - Fat-free Shelf Stable Milk
  - Goat Milk
- Flavoured Milk Drinks
  - Dairy Only Flavoured Milk Drinks
  - Flavoured Milk Drinks with Fruit Juice
- Powder Milk
- Soy Drinks
- Drinking Milk Products
  - Cow's Milk
- Milk Alternatives
- Other Milk Alternatives



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

**Table 3 Sales of Drinking Milk Products by Category: % Volume Growth 2016-2021**

% volume growth	2020/21	2016-21 CAGR	2016/21 Total
-----------------	---------	--------------	---------------

- Milk
  - Fresh Milk
    - Full Fat Fresh Milk
    - Semi Skimmed Fresh Milk
    - Fat-free Fresh Milk
  - Shelf Stable Milk
    - Full Fat Shelf Stable Milk
    - Semi Skimmed Shelf Stable Milk
    - Fat-free Shelf Stable Milk
  - Goat Milk
- Flavoured Milk Drinks
  - Dairy Only Flavoured Milk Drinks
  - Flavoured Milk Drinks with Fruit Juice
- Powder Milk
- Soy Drinks
- Drinking Milk Products
  - Cow's Milk
- Milk Alternatives
- Other Milk Alternatives



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

**Table 4 Sales of Drinking Milk Products by Category: % Value Growth 2016-2021**

% current value growth

	2020/21	2016-21 CAGR	2016/21 Total
- Milk			
--- Fresh Milk			
---- Full Fat Fresh Milk			
---- Semi Skimmed Fresh Milk			
---- Fat-free Fresh Milk			
--- Shelf Stable Milk			
---- Full Fat Shelf Stable Milk			
---- Semi Skimmed Shelf Stable Milk			
---- Fat-free Shelf Stable Milk			
-- Goat Milk			
- Flavoured Milk Drinks			
-- Dairy Only Flavoured Milk Drinks			
-- Flavoured Milk Drinks with Fruit Juice			
- Powder Milk			
-- Soy Drinks			
Drinking Milk Products			
-- Cow's Milk			
- Milk Alternatives			
-- Other Milk Alternatives			

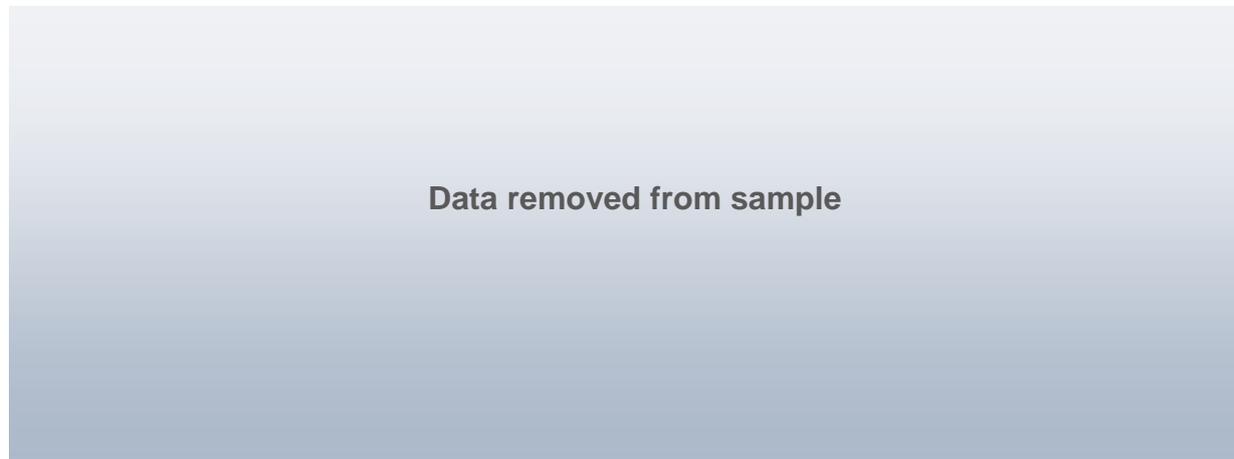


Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

**Table 5 NBO Company Shares of Drinking Milk Products: % Value 2017-2021**

% retail value rsp

Company 2017 2018 2019 2020 2021

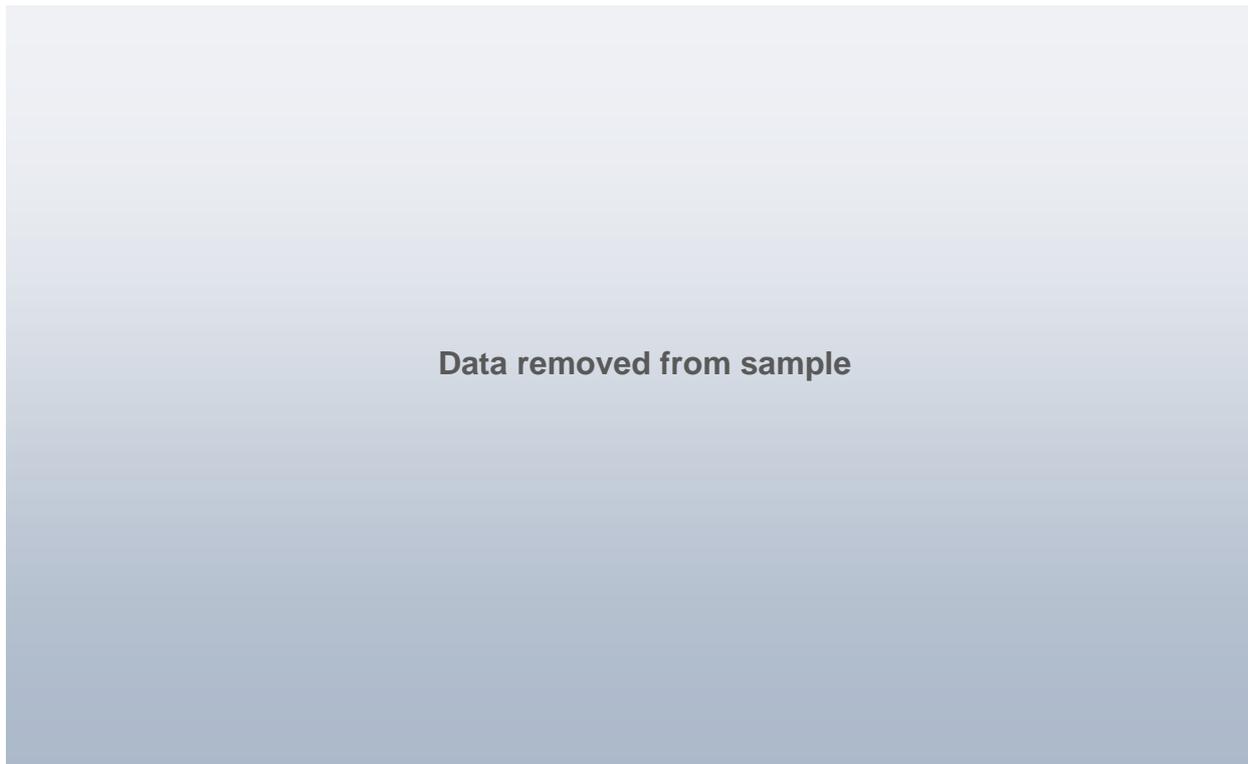


Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

**Table 6 LBN Brand Shares of Drinking Milk Products: % Value 2018-2021**

% retail value rsp

Brand (GBO)	Company (NBO)	2018	2019	2020	2021
-------------	---------------	------	------	------	------

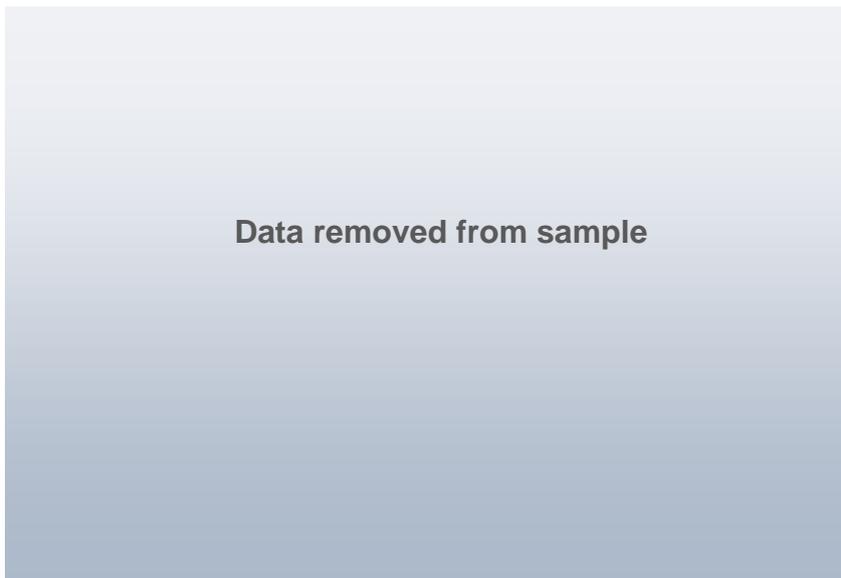


Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

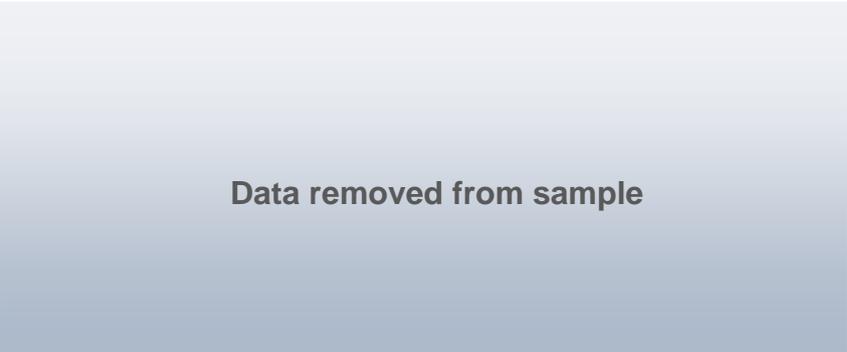
**Table 7** Distribution of Drinking Milk Products by Format: % Value 2016-2021

% retail value rsp	2016	2017	2018	2019	2020	2021
--------------------	------	------	------	------	------	------

- Store-Based Retailing
- 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
- Health and Beauty Specialist Retailers



- Other Foods Non-Grocery Specialists
- Mixed Retailers
- Non-Store Retailing
- Vending
- Homeshopping
- E-Commerce
- Direct Selling
- Total



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

**Table 8 Forecast Sales of Drinking Milk Products Products by Category: Volume 2021-2026**

	2021	2022	2023	2024	2025	2026
- Milk (million litres)	Data removed from sample					
-- Fresh Milk (million litres)						
---- Full Fat Fresh Milk (million litres)						
---- Semi Skimmed Fresh Milk (million litres)						
---- Fat-free Fresh Milk (million litres)						
-- Shelf Stable Milk (million litres)						
---- Full Fat Shelf Stable Milk (million litres)						
---- Semi Skimmed Shelf Stable Milk (million litres)						
---- Fat-free Shelf Stable Milk (million litres)						
-- Goat Milk (million litres)						
- Flavoured Milk Drinks (million litres)						
-- Dairy Only Flavoured Milk Drinks (million litres)						
-- Flavoured Milk Drinks with Fruit Juice (million litres)						
- Powder Milk ('000 tonnes)						
-- Soy Drinks (million litres)						
Drinking Milk Products (Not calculable)						
-- Cow's Milk (million litres)						
- Milk Alternatives (million litres)						
-- Other Milk Alternatives (million						

litres)

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

**Table 9 Forecast Sales of Drinking Milk Products Products by Category: Value 2021-2026**

EUR million

	2021	2022	2023	2024	2025	2026
- Milk	<b>Data removed from sample</b>					
--- Fresh Milk						
---- Full Fat Fresh Milk						
---- Semi Skimmed Fresh Milk						
---- Fat-free Fresh Milk						
--- Shelf Stable Milk						
---- Full Fat Shelf Stable Milk						
---- Semi Skimmed Shelf Stable Milk						
---- Fat-free Shelf Stable Milk						
-- Goat Milk						
- Flavoured Milk Drinks						
-- Dairy Only Flavoured Milk Drinks						
-- Flavoured Milk Drinks with Fruit Juice						
- Powder Milk						
-- Soy Drinks						
Drinking Milk Products						
-- Cow's Milk						
- Milk Alternatives						
-- Other Milk Alternatives						

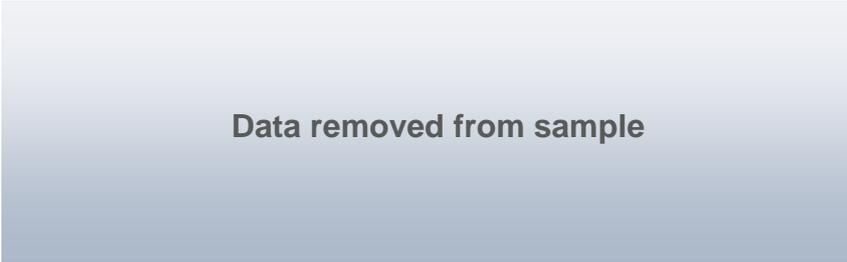
Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

**Table 10 Forecast Sales of Drinking Milk Products Products by Category: % Volume Growth 2021-2026**

% volume growth

	2021/22	2021-26 CAGR	2021/26 Total
- Milk	<b>Data removed from sample</b>		
--- Fresh Milk			
---- Full Fat Fresh Milk			
---- Semi Skimmed Fresh Milk			
---- Fat-free Fresh Milk			
--- Shelf Stable Milk			
---- Full Fat Shelf Stable Milk			
---- Semi Skimmed Shelf Stable Milk			
---- Fat-free Shelf Stable Milk			
-- Goat Milk			
- Flavoured Milk Drinks			
-- Dairy Only Flavoured Milk Drinks			

- Flavoured Milk Drinks with Fruit Juice
- Powder Milk
- Soy Drinks
- Drinking Milk Products
- Cow's Milk
- Milk Alternatives
- Other Milk Alternatives



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

**Table 11 Forecast Sales of Drinking Milk Products Products by Category: % Value Growth 2021-2026**

% constant value growth

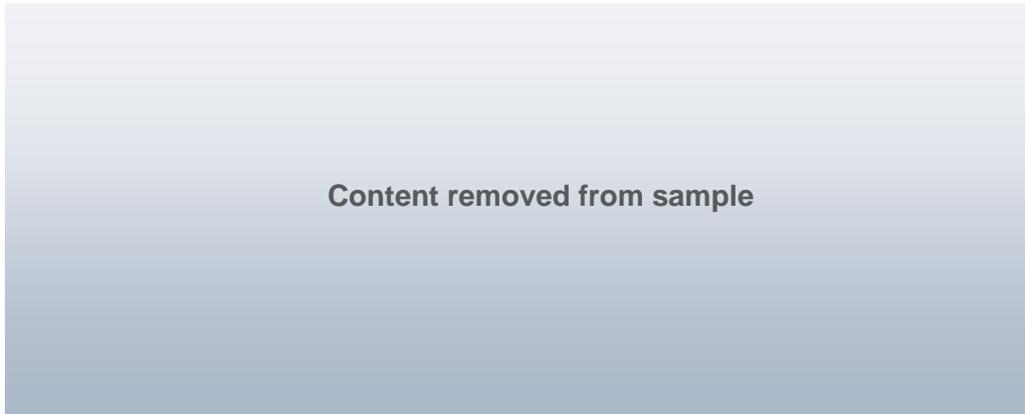
	2021/2022	2021-26 CAGR	2021/26 Total
- Milk	<b>Data removed from sample</b>		
--- Fresh Milk			
---- Full Fat Fresh Milk			
---- Semi Skimmed Fresh Milk			
---- Fat-free Fresh Milk			
--- Shelf Stable Milk			
---- Full Fat Shelf Stable Milk			
---- Semi Skimmed Shelf Stable Milk			
---- Fat-free Shelf Stable Milk			
-- Goat Milk			
- Flavoured Milk Drinks			
-- Dairy Only Flavoured Milk Drinks			
-- Flavoured Milk Drinks with Fruit Juice			
- Powder Milk			
-- Soy Drinks			
Drinking Milk Products			
-- Cow's Milk			
- Milk Alternatives			
-- Other Milk Alternatives			

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

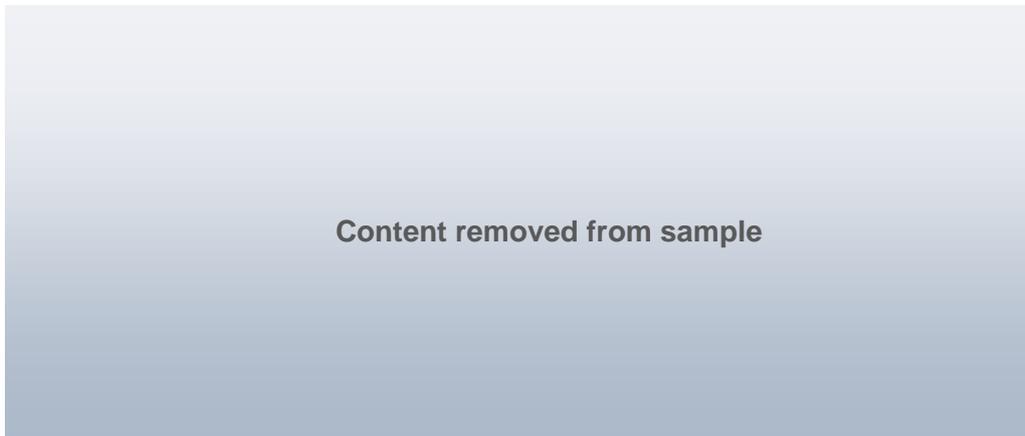
# DAIRY PRODUCTS AND ALTERNATIVES IN ESTONIA - INDUSTRY OVERVIEW

## EXECUTIVE SUMMARY

### Dairy products and alternatives in 2021: the big picture



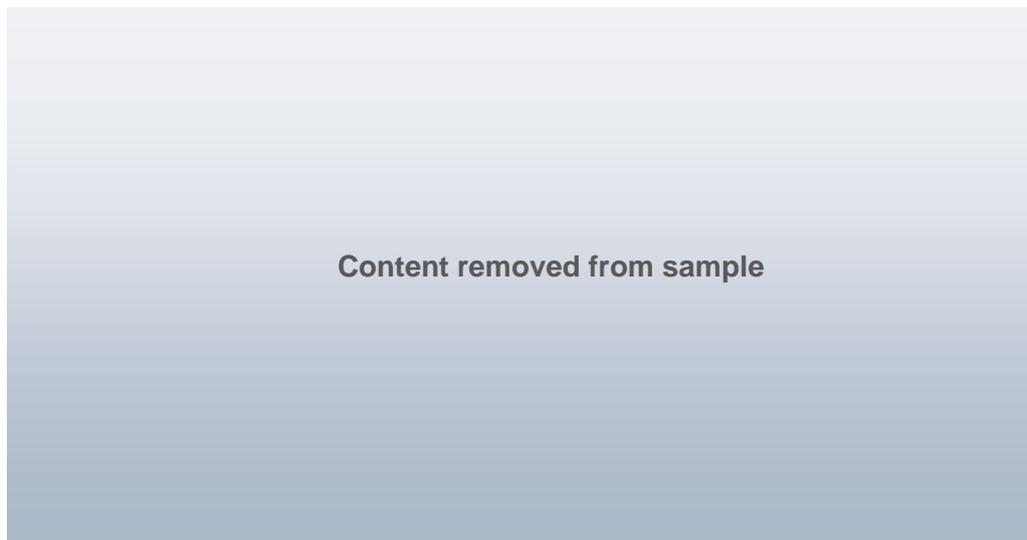
### Key trends in 2021



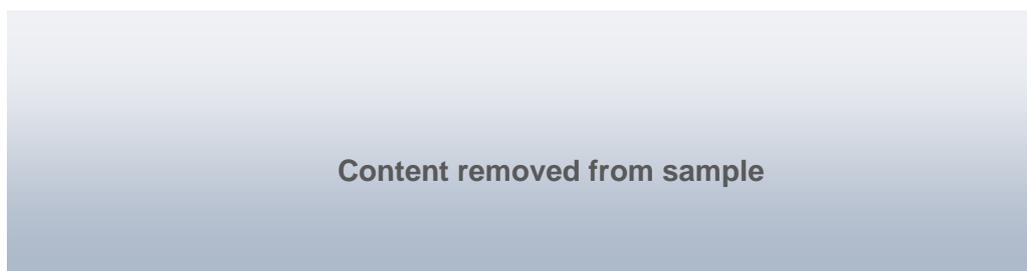
### Competitive landscape



### Channel developments



### What next for dairy products and alternatives?



### MARKET DATA

Table 12 Sales of Dairy Products and Alternatives by Category: Value 2016-2021

EUR million

	2016	2017	2018	2019	2020	2021
Baby Food	<b>Data removed from sample</b>					
Dairy						
Dairy Products and Alternatives						

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

Table 13 Sales of Dairy Products and Alternatives by Category: % Value Growth 2016-2021

% current value growth	2020/21	2016-21 CAGR	2016/21 Total

Dairy Products and Alternatives  
 Dairy  
 Baby Food

**Data removed from sample**

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

**Table 14 NBO Company Shares of Dairy Products and Alternatives: % Value 2017-2021**

% retail value rsp 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 15 LBN Brand Shares of Dairy Products and Alternatives: % Value 2018-2021**

% retail value rsp Brand (GBO)	Company (NBO)	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 16 Penetration of Private Label by Category: % Value 2016-2021**

% retail value rsp	2016	2017	2018	2019	2020	2021
Dairy Dairy Products and Alternatives	<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 17 Distribution of Dairy Products and Alternatives by Format: % Value 2016-2021**

% retail value rsp	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						
-- Health and Beauty Specialist Retailers						
-- Other Foods Non-Grocery Specialists						
- Mixed Retailers						
Non-Store Retailing						
- Vending						
- Homeshopping						
- E-Commerce						
- Direct Selling						
Total						

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

**Table 18 Forecast Sales of Dairy Products and Alternatives by Category: Value 2021-2026**

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

Dairy Products and Alternatives  
Dairy  
Baby Food

**Data removed from sample**

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

**Table 19 Forecast Sales of Dairy Products and Alternatives by Category: % Value Growth 2021-2026**

% constant value growth

2021/2022      2021-26 CAGR      2021/26 Total

Dairy  
Dairy Products and Alternatives  
Baby Food

**Data removed from sample**

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

## DISCLAIMER

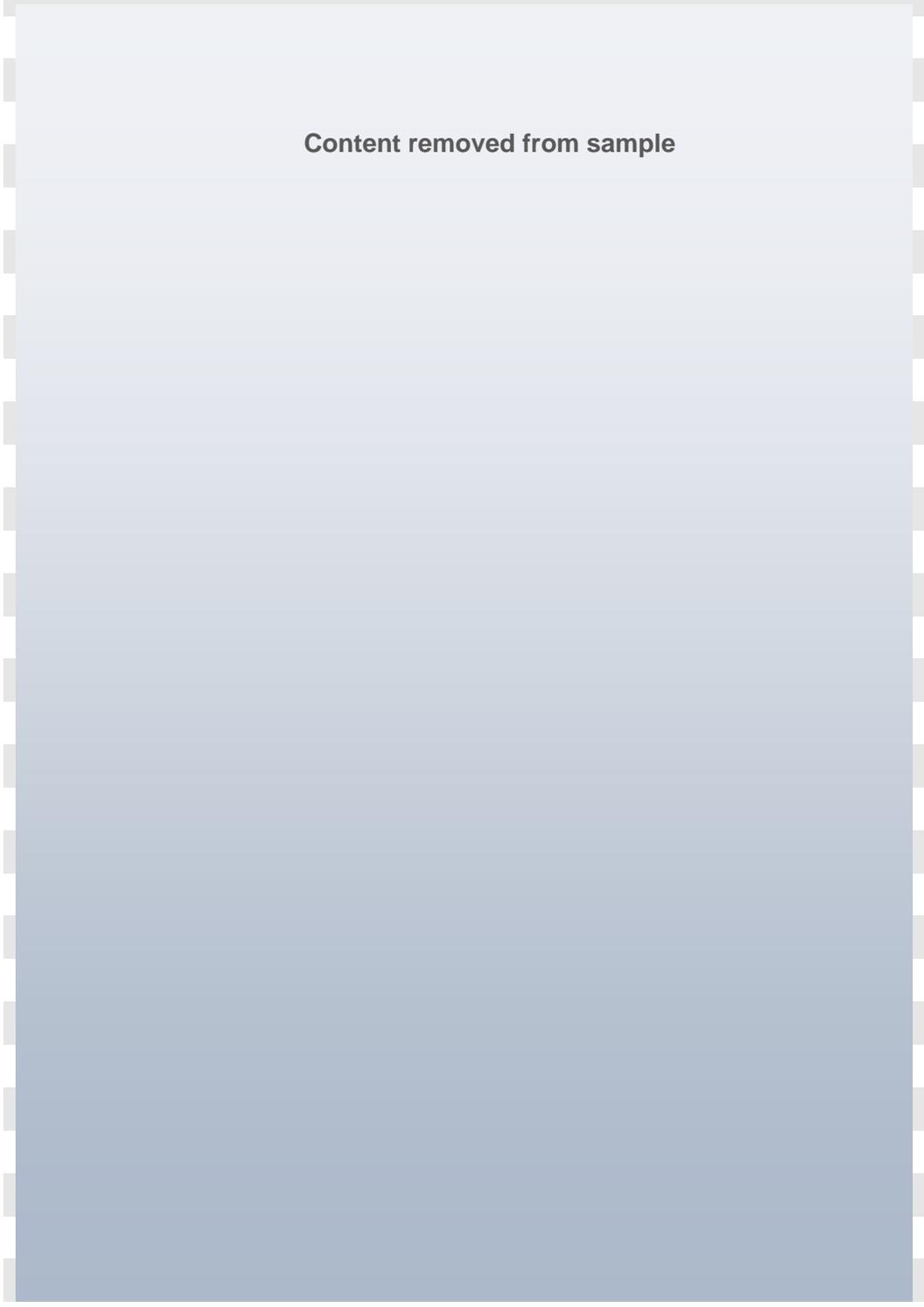
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## SOURCES

Sources used during research include the following:

Summary 1      Research Sources

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