



# Passport

## Bottled Water in Estonia

Euromonitor International

January 2021

This sample report is for illustration  
purposes only.

Some content and data have been  
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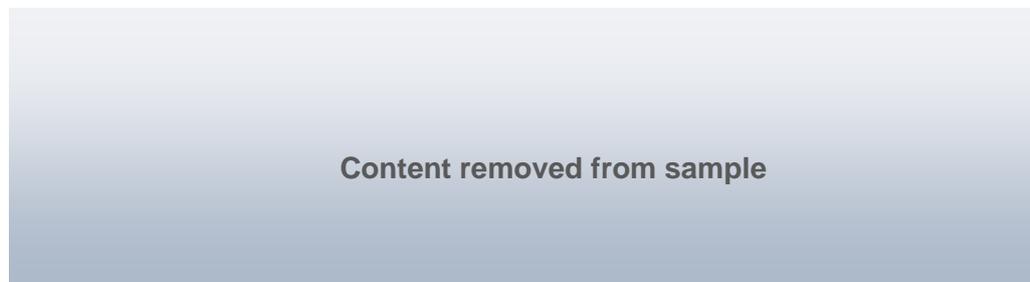
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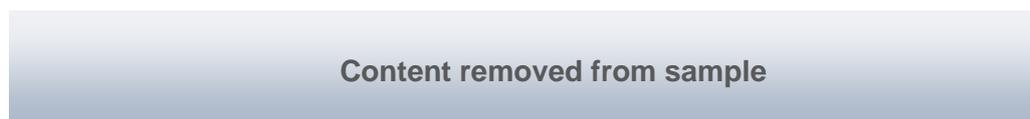
# BOTTLED WATER IN ESTONIA - CATEGORY ANALYSIS

## KEY DATA FINDINGS

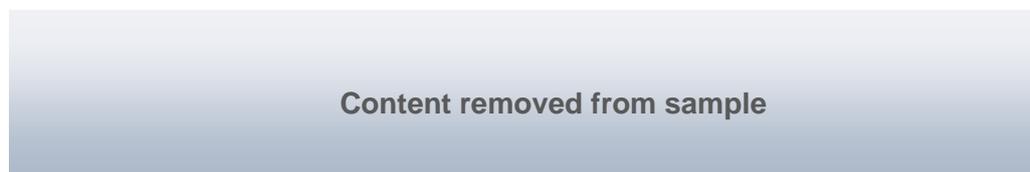


## 2020 IMPACT

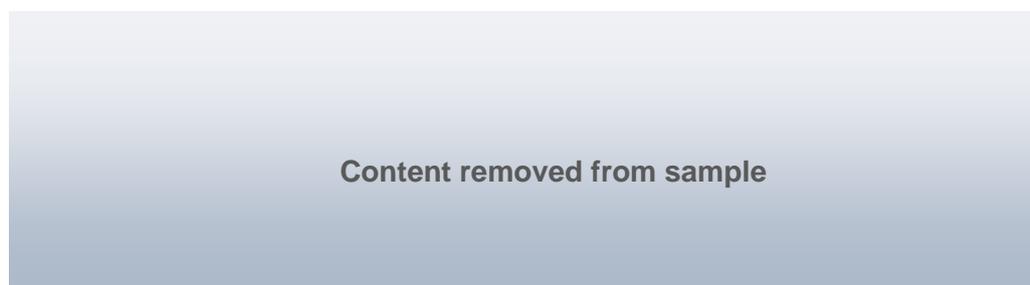
On-trade and sports facility closures lead to an overall decline in bottled water in 2020



Functional bottled water performs well as it taps into the growing health and wellness trend

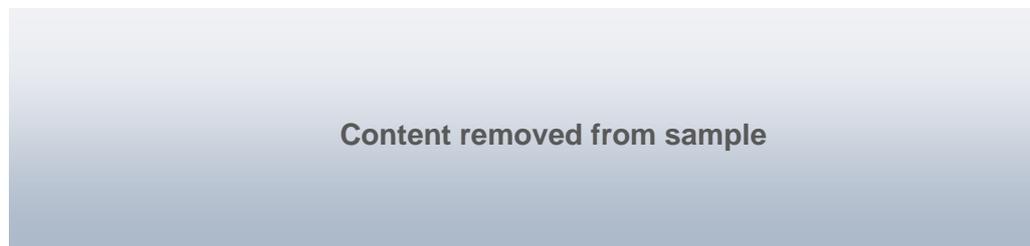


Carbonated bottled water players gain ground in 2020, despite overall decline of category

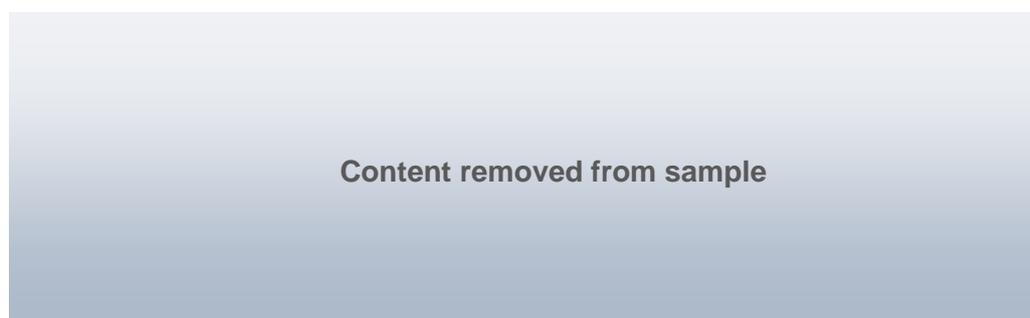


## RECOVERY AND OPPORTUNITIES

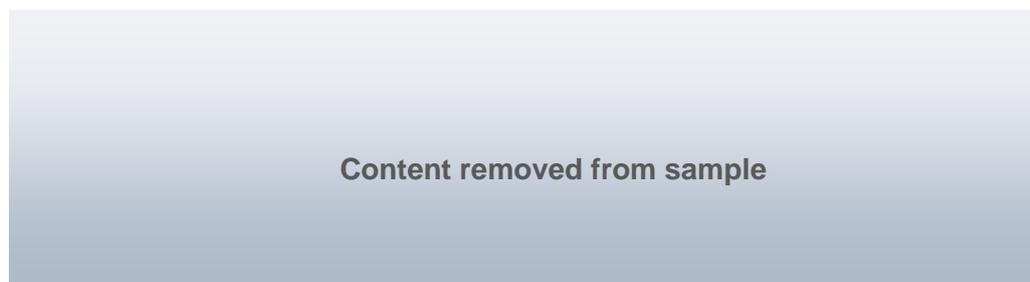
Innovation will be seen in packaging as well as products as new players enter the scene



On-trade recovery will give bottled water A boost in 2021, but retail growth will remain modest



Innovation in functional bottled water will drive sales across the forecast period



### CATEGORY DATA

Table 1 Off-trade Sales of Bottled Water by Category: Volume 2015-2020

million litres

	2015	2016	2017	2018	2019	2020
Carbonated Bottled Water	Data removed from sample					
Flavoured Bottled Water						
Functional Bottled Water						
Still Bottled Water						
Bottled Water						

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

**Table 2** Off-trade Sales of Bottled Water by Category: Value 2015-2020

EUR million

	2015	2016	2017	2018	2019	2020
Carbonated Bottled Water	<b>Data removed from sample</b>					
Flavoured Bottled Water						
Functional Bottled Water						
Still Bottled Water						
Bottled Water						

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

**Table 3** Off-trade Sales of Bottled Water by Category: % Volume Growth 2015-2020

% volume growth

	2019/20	2015-20 CAGR	2015/20 Total
Carbonated Bottled Water	<b>Data removed from sample</b>		
Flavoured Bottled Water			
Functional Bottled Water			
Still Bottled Water			
Bottled Water			

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

**Table 4** Off-trade Sales of Bottled Water by Category: % Value Growth 2015-2020

% current value growth

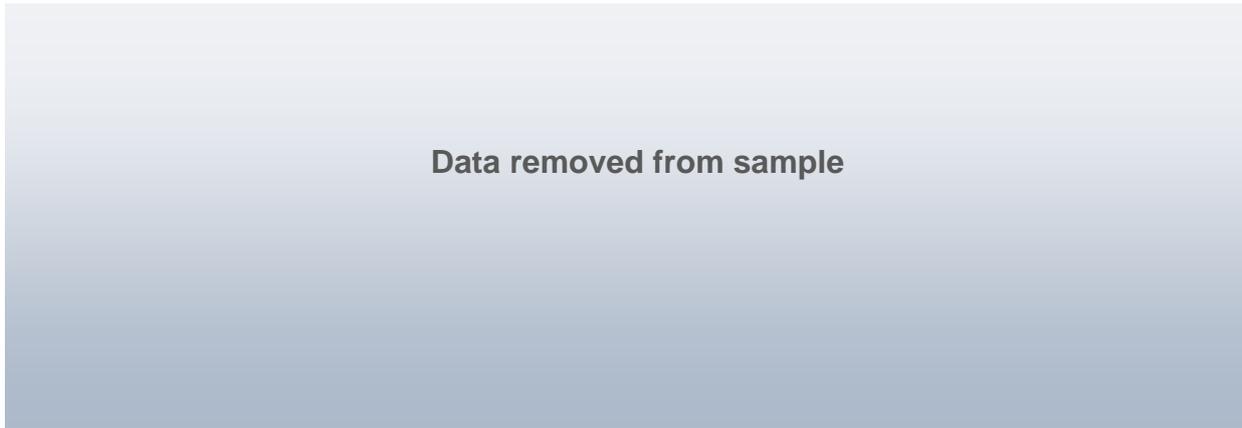
	2019/20	2015-20 CAGR	2015/20 Total
Carbonated Bottled Water	<b>Data removed from sample</b>		
Flavoured Bottled Water			
Functional Bottled Water			
Still Bottled Water			
Bottled Water			

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

**Table 5** NBO Company Shares of Off-trade Bottled Water: % Volume 2016-2020

% off-trade volume

Company	2016	2017	2018	2019	2020
	<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 6** LBN Brand Shares of Off-trade Bottled Water: % Volume 2017-2020

% off-trade volume Brand (GBO)	Company (NBO)	2017	2018	2019	2020
-----------------------------------	---------------	------	------	------	------



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

**Table 7** NBO Company Shares of Off-trade Bottled Water: % Value 2016-2020

% off-trade value rsp Company	2016	2017	2018	2019	2020
----------------------------------	------	------	------	------	------

**Data removed from sample**

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

**Table 8** LBN Brand Shares of Off-trade Bottled Water: % Value 2017-2020

% off-trade value rsp Brand (GBO)	Company (NBO)	2017	2018	2019	2020
--------------------------------------	---------------	------	------	------	------

**Data removed from sample**

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

**Table 9 Forecast Off-trade Sales of Bottled Water by Category: Volume 2020-2025**

million litres

	2020	2021	2022	2023	2024	2025
Carbonated Bottled Water	<b>Data removed from sample</b>					
Flavoured Bottled Water						
Functional Bottled Water						
Still Bottled Water						
Bottled Water						

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

**Table 10 Forecast Off-trade Sales of Bottled Water by Category: Value 2020-2025**

EUR million

	2020	2021	2022	2023	2024	2025
Carbonated Bottled Water	<b>Data removed from sample</b>					
Flavoured Bottled Water						
Functional Bottled Water						
Still Bottled Water						
Bottled Water						

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

**Table 11 Forecast Off-trade Sales of Bottled Water by Category: % Volume Growth 2020-2025**

% volume growth

	2020/21	2020-25 CAGR	2020/25 Total
Carbonated Bottled Water	<b>Data removed from sample</b>		
Flavoured Bottled Water			
Functional Bottled Water			
Still Bottled Water			
Bottled Water			

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

**Table 12 Forecast Off-trade Sales of Bottled Water by Category: % Value Growth 2020-2025**

% constant value growth

	2020/2021	2020-25 CAGR	2020/25 Total
Carbonated Bottled Water	<b>Data removed from sample</b>		
Flavoured Bottled Water			
Functional Bottled Water			
Still Bottled Water			
Bottled Water			

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

# SOFT DRINKS IN ESTONIA - INDUSTRY OVERVIEW

## EXECUTIVE SUMMARY

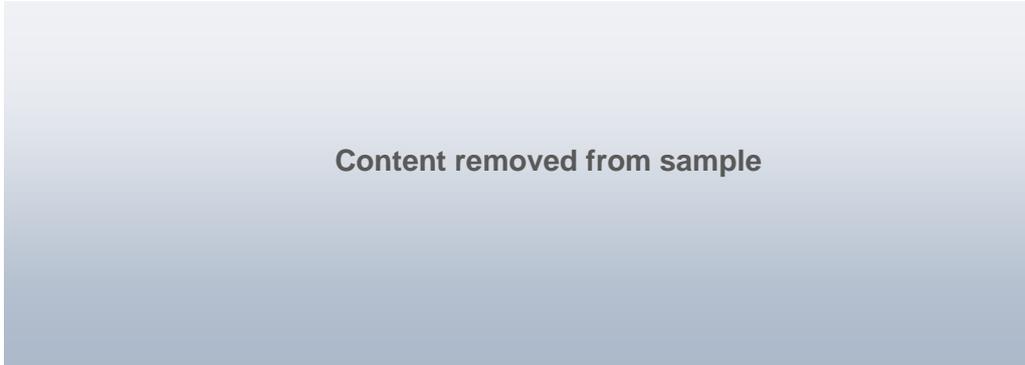
### COVID-19 impact on soft drinks

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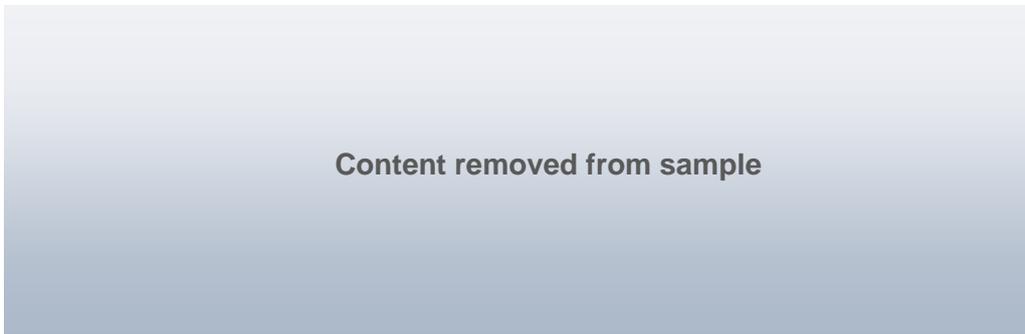
### COVID-19 country impact

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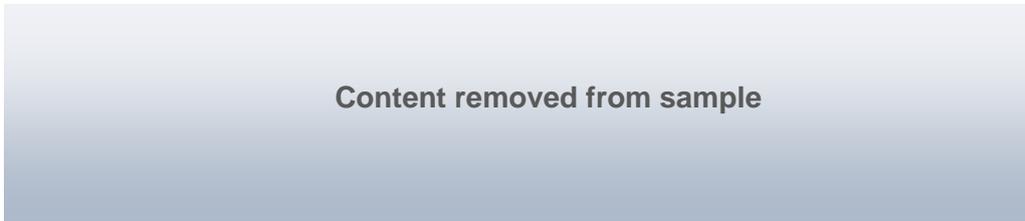
### Company response



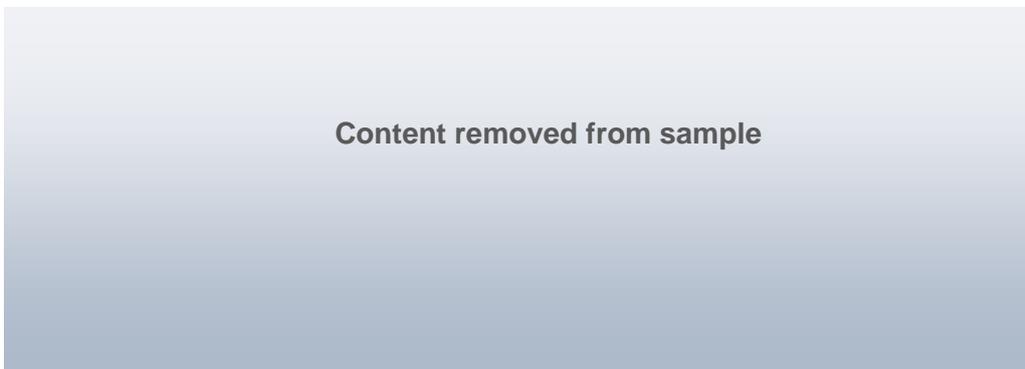
### Retailing shift



### Foodservice vs retail split



### What next for soft drinks?



## MARKET DATA

**Table 13** Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: Volume 2015-2020

million litres

	2015	2016	2017	2018	2019	2020
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 14** Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: % Volume Growth 2015-2020

% volume growth

	2019/20	2015-20 CAGR	2015/20 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 15** Off-trade vs On-trade Sales of Soft Drinks by Channel: Value 2015-2020

EUR million

	2015	2016	2017	2018	2019	2020
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 16** Off-trade vs On-trade Sales of Soft Drinks by Channel: % Value Growth 2015-2020

% constant value growth

	2019/20	2015-20 CAGR	2015/20 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 17** Off-trade vs On-trade Sales of Soft Drinks (as sold) by Category: Volume 2019

million litres

	Off-trade	On-trade	Total
Bottled Water	<b>Data removed from sample</b>		
Carbonates			
Concentrates			
Juice			
RTD Coffee			
RTD Tea			
Energy Drinks			
Sports Drinks			
Asian Speciality Drinks			
Soft Drinks			

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

Note: Excludes powder concentrates

**Table 18** Off-trade vs On-trade Sales of Soft Drinks (as sold) by Category: % Volume 2019

% volume analysis

	Off-trade	On-trade	Total
Bottled Water	<b>Data removed from sample</b>		
Carbonates			
Concentrates			
Juice			
RTD Coffee			
RTD Tea			
Energy Drinks			
Sports Drinks			
Asian Speciality Drinks			
Soft Drinks			

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

Note: Excludes powder concentrates

**Table 19** Off-trade vs On-trade Sales of Soft Drinks by Category: Value 2019

EUR million

	Off-trade	On-trade	Total
Bottled Water	<b>Data removed from sample</b>		
Carbonates			
Concentrates			
Juice			
RTD Coffee			
RTD Tea			
Energy Drinks			
Sports Drinks			
Asian Speciality Drinks			
Soft Drinks			

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

**Table 20** Off-trade vs On-trade Sales of Soft Drinks by Category: % Value 2019

% value analysis

	Off-trade	On-trade	Total
Bottled Water	<b>Data removed from sample</b>		
Carbonates			
Concentrates			
Juice			
RTD Coffee			
RTD Tea			
Energy Drinks			
Sports Drinks			
Asian Speciality Drinks			
Soft Drinks			

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

**Table 21** Off-trade Sales of Soft Drinks (RTD) by Category: Volume 2015-2020

million litres	2015	2016	2017	2018	2019	2020
Bottled Water	<b>Data removed from sample</b>					
Carbonates						
Concentrates						
Juice						
RTD Coffee						
RTD Tea						
Energy Drinks						
Sports Drinks						
Asian Speciality Drinks						
Soft Drinks						

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

**Table 22** Off-trade Sales of Soft Drinks (RTD) by Category: % Volume Growth 2015-2020

% volume growth	2019/20	2015-20 CAGR	2015/20 Total
Bottled Water	<b>Data removed from sample</b>		
Carbonates			
Concentrates			
Juice			
RTD Coffee			
RTD Tea			
Energy Drinks			
Sports Drinks			
Asian Speciality Drinks			
Soft Drinks			

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

**Table 23** Off-trade Sales of Soft Drinks by Category: Value 2015-2020

EUR million

	2015	2016	2017	2018	2019	2020
Bottled Water	<b>Data removed from sample</b>					
Carbonates						
Concentrates						
Juice						
RTD Coffee						
RTD Tea						
Energy Drinks						
Sports Drinks						
Asian Speciality Drinks						
Soft Drinks						

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

**Table 24 Off-trade Sales of Soft Drinks by Category: % Value Growth 2015-2020**

% current value growth

	2019/20	2015-20 CAGR	2015/20 Total
Bottled Water	<b>Data removed from sample</b>		
Carbonates			
Concentrates			
Juice			
RTD Coffee			
RTD Tea			
Energy Drinks			
Sports Drinks			
Asian Speciality Drinks			
Soft Drinks			

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

**Table 25 Sales of Soft Drinks by Total Fountain On-trade: Volume 2015-2020**

million litres

	2015	2016	2017	2018	2019	2020
Total Fountain On-trade	<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 Sales of Soft Drinks by Total Fountain On-trade: % Volume Growth 2015-2020**

% fountain volume growth

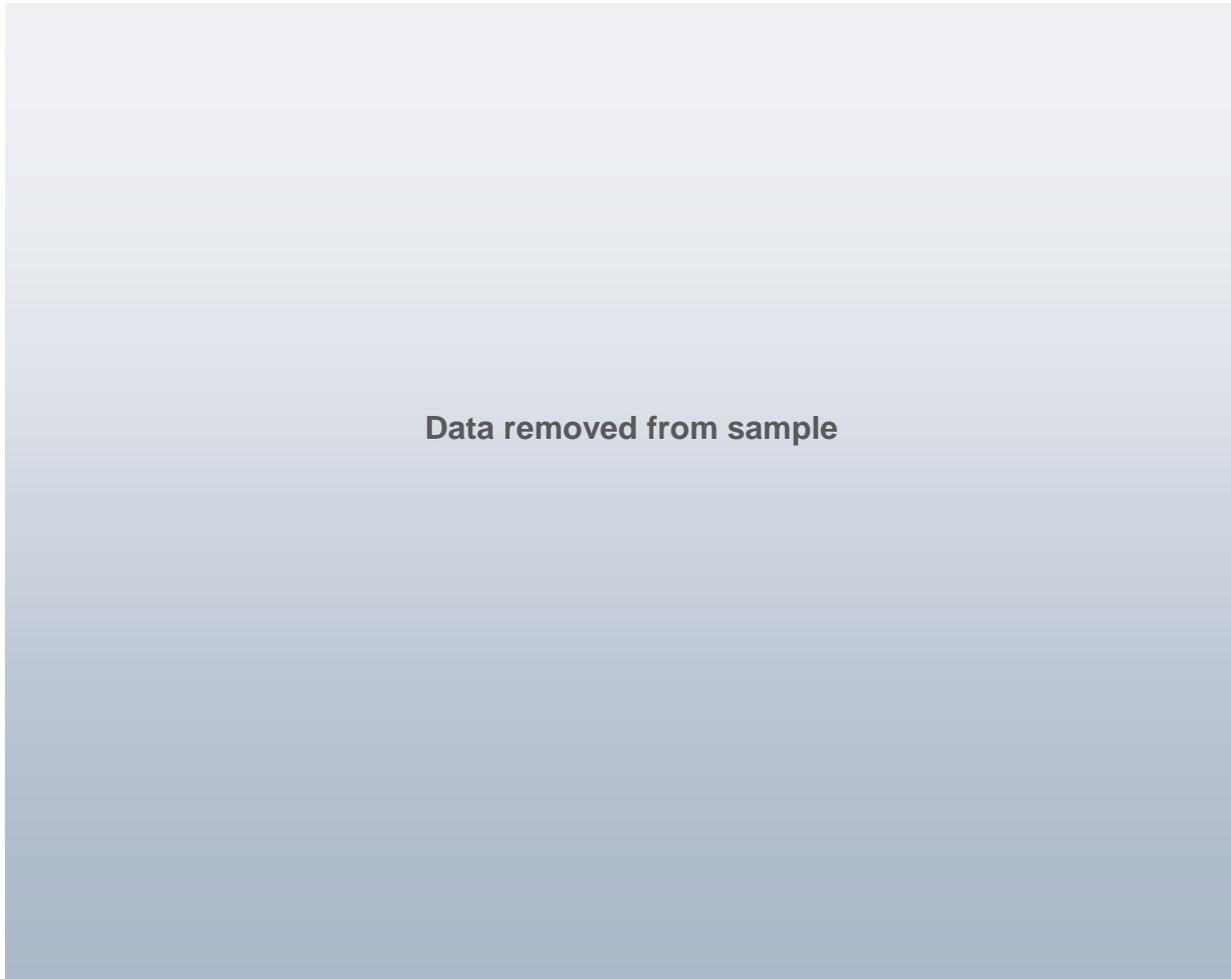
	2019/20	2015-20 CAGR	2015/20 Total
Total Fountain On-trade	<b>Data removed from sample</b>		

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

**Table 27 NBO Company Shares of Off-trade Soft Drinks (RTD): % Volume 2016-2020**

% off-trade volume  
Company

2016      2017      2018      2019      2020

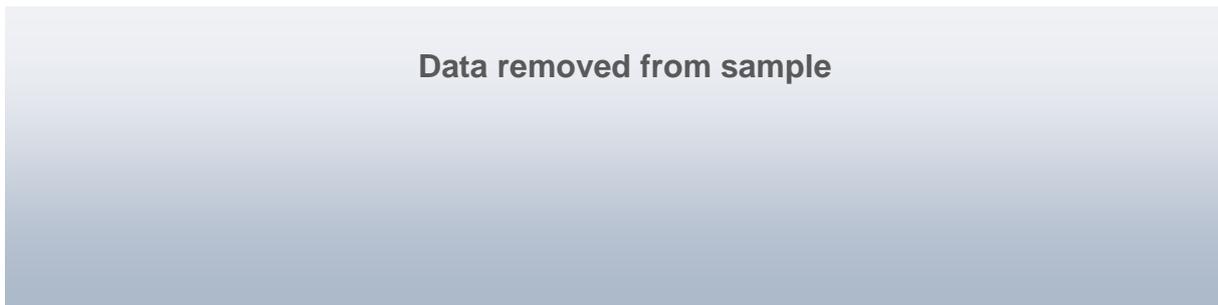


Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

**Table 28**      LBN Brand Shares of Off-trade Soft Drinks (RTD): % Volume 2017-2020

% off-trade volume  
Brand (GBO)

Company (NBO)      2017      2018      2019      2020



**Data removed from sample**

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

**Table 29 NBO Company Shares of Off-trade Soft Drinks: % Value 2016-2020**

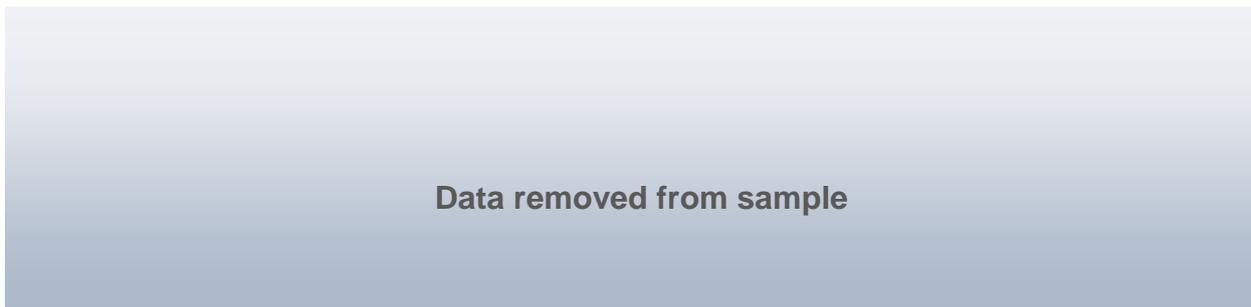
% off-trade value rsp Company	2016	2017	2018	2019	2020
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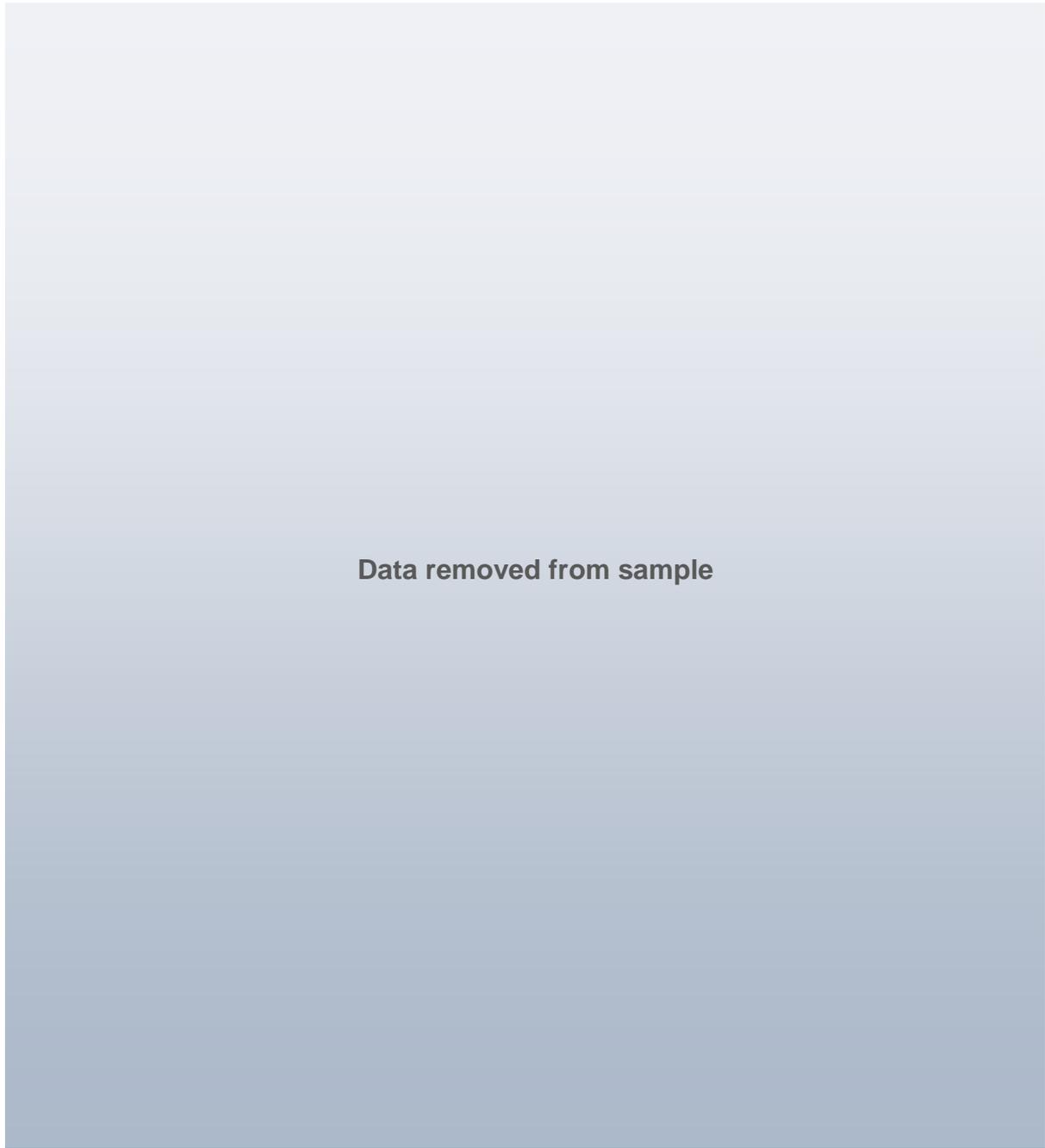


Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

**Table 30 LBN Brand Shares of Off-trade Soft Drinks: % Value 2017-2020**

% off-trade value rsp Brand (GBO)	Company (NBO)	2017	2018	2019	2020
--------------------------------------	---------------	------	------	------	------





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

Table 31 Penetration of Private Label in Off-trade Soft Drinks (RTD) by Category: % Volume 2015-2020

% retail rtd volume

	2015	2016	2017	2018	2019	2020
Bottled Water	<b>Data removed from sample</b>					
Carbonates						
Concentrates						
Juice						
RTD Tea						
Soft Drinks						

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

**Table 32 Penetration of Private Label in Off-trade Soft Drinks by Category: % Value 2015-2020**

% retail value rsp

	2015	2016	2017	2018	2019	2020
Bottled Water	<b>Data removed from sample</b>					
Carbonates						
Concentrates						
Juice						
RTD Tea						
Soft Drinks						

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

**Table 33 Distribution of Off-trade Soft Drinks (as sold) by Format: % Volume 2015-2020**

% off-trade

	2015	2016	2017	2018	2019	2020
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						
- Mixed Retailers						
- Non-Grocery Specialists						
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 34** Distribution of Off-trade Soft Drinks (as sold) by Format and Category: % Volume 2020

% off-trade	BW	CB	CN	JU	RTDC	RTDT
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						
- Mixed Retailers						
- Non-Grocery Specialists						
Non-Store Retailing						
- Vending						
- Homeshopping						
- E-Commerce						
- Direct Selling						
Total						
	ED	SPD	ASD	<b>Data removed from sample</b>		
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						
- Mixed Retailers						
- Non-Grocery Specialists						
Non-Store Retailing						
- Vending						
- Homeshopping						

- E-Commerce  
 - Direct Selling  
 Total

**Data removed from sample**

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources  
 Key: BW = bottled water; CB = carbonates; CN = concentrates; JU = juice; RTDC = RTD coffee; RTDT = RTD tea; ED = energy drinks; SPD = sports drinks; ASD = Asian speciality drinks  
 Note: Excludes powder concentrates

**Table 35 Forecast Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: Volume 2020-2025**

million litres

	2020	2021	2022	2023	2024	2025
Off-trade	<b>Data removed from sample</b>					
On-trade						
Total						

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

**Table 36 Forecast Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: % Volume Growth 2020-2025**

% volume growth

	2020/21	2020-25 CAGR	2020/25 Total
Off-trade	<b>Data removed from sample</b>		
On-trade			
Total			

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

**Table 37 Forecast Off-trade vs On-trade Sales of Soft Drinks by Channel: Value 2020-2025**

EUR million

	2020	2021	2022	2023	2024	2025
Off-trade	<b>Data removed from sample</b>					
On-trade						
Total						

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

**Table 38 Forecast Off-trade vs On-trade Sales of Soft Drinks by Channel: % Value Growth 2020-2025**

% constant value growth

	2020/21	2020-25 CAGR	2020/25 Total
Off-trade	<b>Data removed from sample</b>		
On-trade			
Total			

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

**Table 39 Forecast Off-trade Sales of Soft Drinks (RTD) by Category: Volume 2020-2025**

million litres	2020	2021	2022	2023	2024	2025
Bottled Water	<b>Data removed from sample</b>					
Carbonates						
Concentrates						
Juice						
RTD Coffee						
RTD Tea						
Energy Drinks						
Sports Drinks						
Asian Speciality Drinks						
Soft Drinks						

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

**Table 40 Forecast Off-trade Sales of Soft Drinks (RTD) by Category: % Volume Growth 2020-2025**

% volume growth	2020/21	2020-25 CAGR	2020/25 Total
Bottled Water	<b>Data removed from sample</b>		
Carbonates			
Concentrates			
Juice			
RTD Coffee			
RTD Tea			
Energy Drinks			
Sports Drinks			
Asian Speciality Drinks			
Soft Drinks			

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

**Table 41 Forecast Off-trade Sales of Soft Drinks by Category: Value 2020-2025**

EUR million	2020	2021	2022	2023	2024	2025
Bottled Water	<b>Data removed from sample</b>					
Carbonates						
Concentrates						
Juice						
RTD Coffee						
RTD Tea						
Energy Drinks						
Sports Drinks						
Asian Speciality Drinks						
Soft Drinks						

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

**Table 42 Forecast Off-trade Sales of Soft Drinks by Category: % Value Growth 2020-2025**

% constant value growth

	2020/2021	2020-25 CAGR	2020/25 Total
Bottled Water	<b>Data removed from sample</b>		
Carbonates			
Concentrates			
Juice			
RTD Coffee			
RTD Tea			
Energy Drinks			
Sports Drinks			
Asian Speciality Drinks			
Soft Drinks			

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

**Table 43 Forecast Sales of Soft Drinks by Total Fountain On-trade: Volume 2020-2025**

million litres

	2020	2021	2022	2023	2024	2025
Total Fountain On-trade	<b>Data removed from sample</b>					

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

**Table 44 Forecast Sales of Soft Drinks by Total Fountain On-trade: % Volume Growth 2020-2025**

% fountain volume growth

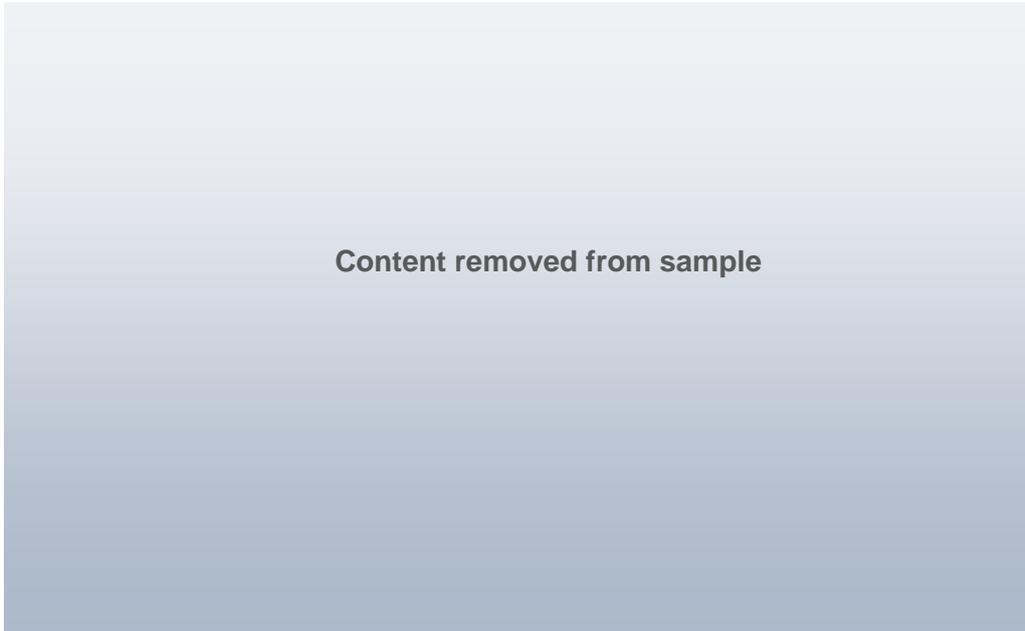
	2020/21	2020-25 CAGR	2020/25 Total
Total Fountain On-trade	<b>Data removed from sample</b>		

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

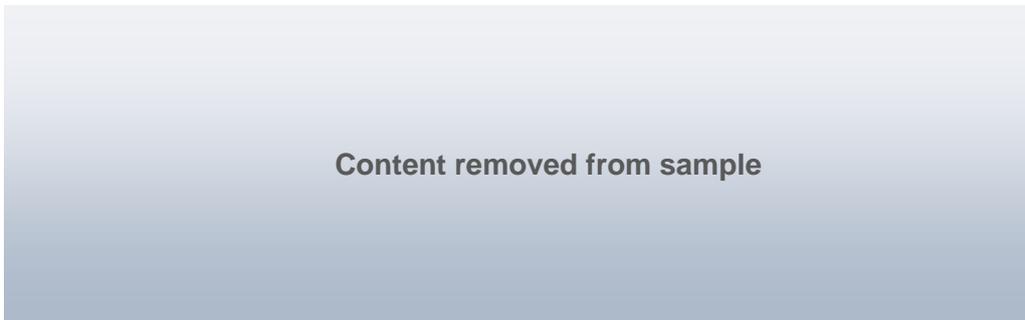
## GLOBAL MACROECONOMIC ENVIRONMENT

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## GLOBAL INDUSTRY ENVIRONMENT



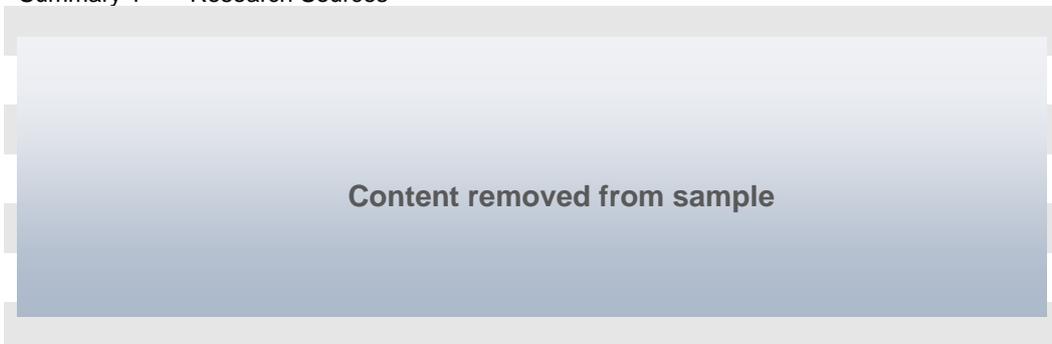
## DISCLAIMER



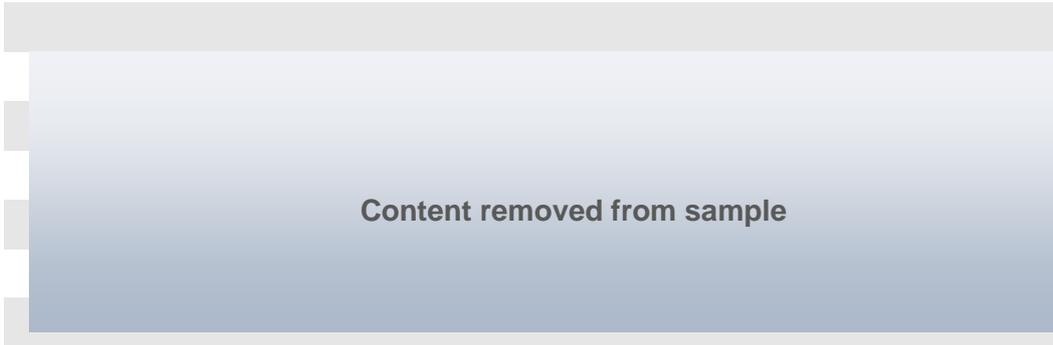
## SOURCES

Sources used during the research included the following:

Summary 1    Research Sources



**Content removed from sample**



Source: Euromonitor International