



Passport

Carbonates in Estonia

Euromonitor International

January 2021

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Some content and data have been
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CARBONATES IN ESTONIA - CATEGORY ANALYSIS

KEY DATA FINDINGS

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2020 IMPACT

Increase in off-trade sales mitigates steep decline in on-trade sales, but carbonates face competition from healthier soft drinks

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Coca-Cola continues to dominate thanks to its ubiquitous presence in Estonia and well-established distribution networks

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Smaller players capitalise on demand for local, natural ingredients, while tonic water gets A boost from off-trade closures

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RECOVERY AND OPPORTUNITIES

Carbonates will see A bounce in on-trade sales in 2021, but faces long-term competition from healthier soft drinks

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Low-sugar and natural carbonates will become more prevalent, while tonic water offers scope for growth

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E-commerce sales will continue to grow as Estonians shop from the comfort of their own homes

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CATEGORY DATA

Table 1 Off-trade vs On-trade Sales of Carbonates: Volume 2015-2020

million litres

	2015	2016	2017	2018	2019	2020
Off-trade	Data removed from sample					
On-trade						
Total						

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

Table 2 Off-trade vs On-trade Sales of Carbonates: Value 2015-2020

EUR million

	2015	2016	2017	2018	2019	2020
Off-trade	Data removed from sample					
On-trade						
Total						

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

Table 3 Off-trade vs On-trade Sales of Carbonates: % Volume Growth 2015-2020

% volume growth

	2019/20	2015-20 CAGR	2015/20 Total
Off-trade	Data removed from sample		
On-trade			
Total			

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

Table 4 Off-trade vs On-trade Sales of Carbonates: % Value Growth 2015-2020

% constant value growth

	2019/20	2015-20 CAGR	2015/20 Total
Off-trade	Data removed from sample		
On-trade			
Total			

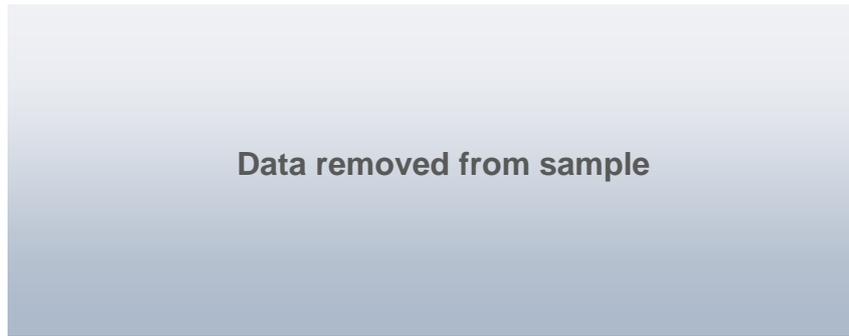
Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 5 Off-trade Sales of Carbonates by Category: Volume 2015-2020

million litres

	2015	2016	2017	2018	2019	2020
Cola Carbonates	Data removed from sample					

- Low Calorie Cola Carbonates
- Regular Cola Carbonates
- Non-Cola Carbonates
- Lemonade/Lime
- Ginger Ale
- Tonic Water/Other Bitters
- Orange Carbonates
- Other Non-Cola Carbonates



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

Table 6 Off-trade Sales of Carbonates by Category: Value 2015-2020

EUR million

	2015	2016	2017	2018	2019	2020
Cola Carbonates	Data removed from sample					
- Low Calorie Cola Carbonates						
- Regular Cola Carbonates						
Non-Cola Carbonates						
- Lemonade/Lime						
- Ginger Ale						
- Tonic Water/Other Bitters						
- Orange Carbonates						
- Other Non-Cola Carbonates						
Carbonates						

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

Table 7 Off-trade Sales of Carbonates by Category: % Volume Growth 2015-2020

% volume growth

	2019/20	2015-20 CAGR	2015/20 Total
Cola Carbonates	Data removed from sample		
- Low Calorie Cola Carbonates			
- Regular Cola Carbonates			
Non-Cola Carbonates			
- Lemonade/Lime			
- Ginger Ale			
- Tonic Water/Other Bitters			
- Orange Carbonates			
- Other Non-Cola Carbonates			
Carbonates			

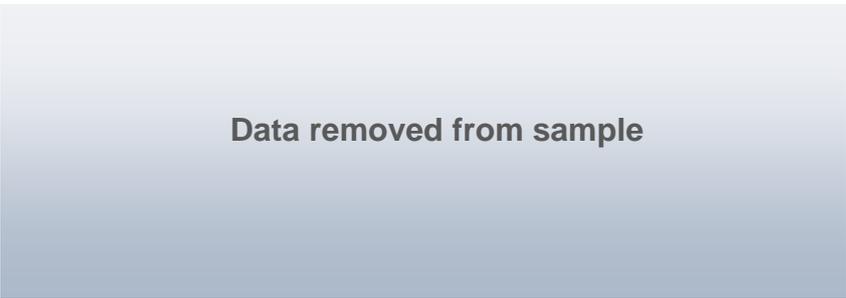
Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 8 Off-trade Sales of Carbonates by Category: % Value Growth 2015-2020

% current value growth

2019/20 2015-20 CAGR 2015/20 Total

- Cola Carbonates
- Low Calorie Cola Carbonates
- Regular Cola Carbonates
- Non-Cola Carbonates
- Lemonade/Lime
- Ginger Ale
- Tonic Water/Other Bitters
- Orange Carbonates
- Other Non-Cola Carbonates
- Carbonates



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

Table 9 Sales of Carbonates by Total Fountain On-trade: Volume 2015-2020

million litres

2015 2016 2017 2018 2019 2020

Total Fountain On-trade



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

Table 10 Sales of Carbonates by Total Fountain On-trade: % Volume Growth 2015-2020

% fountain volume growth

2019/20 2015-20 CAGR 2015/20 Total

Total Fountain On-trade

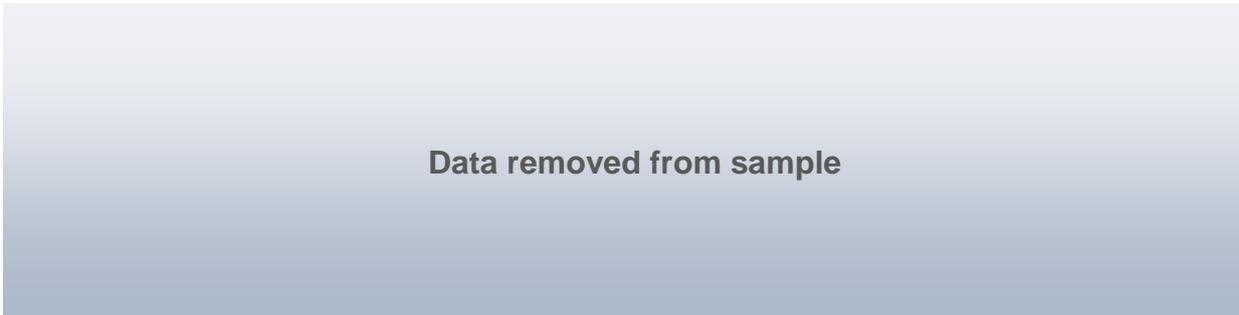


Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 11 NBO Company Shares of Off-trade Carbonates: % 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 12 LBN Brand Shares of Off-trade Carbonates: % Volume 2017-2020

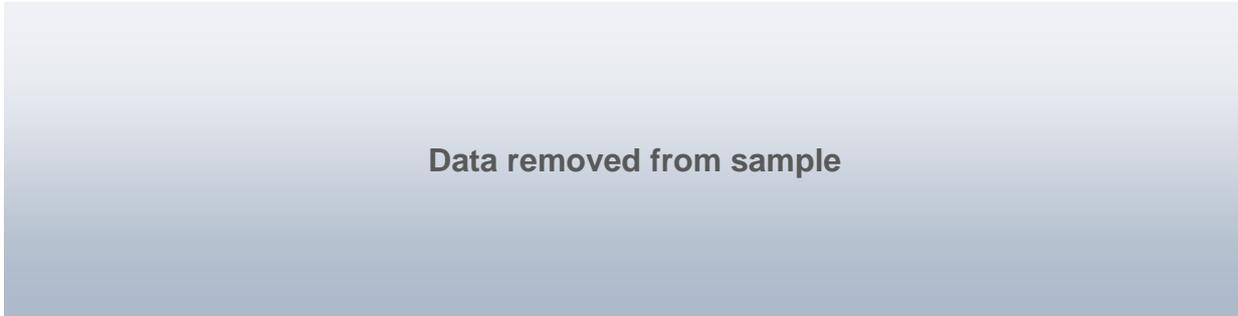
% off-trade volume Brand (GBO)	Company (NBO)	2017	2018	2019	2020
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Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 13 NBO Company Shares of Off-trade Carbonates: % Value 2016-2020

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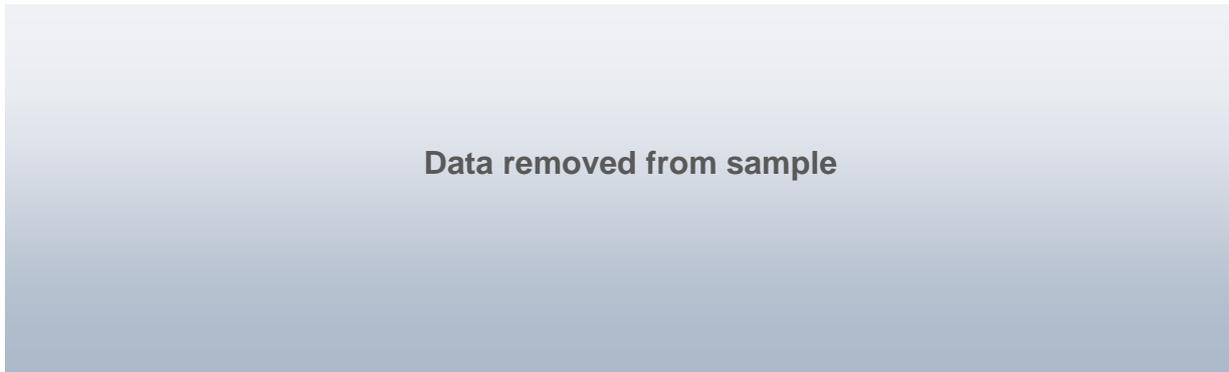


Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 14 LBN Brand Shares of Off-trade Carbonates: % 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 15 Forecast Off-trade Sales of Carbonates by Category: Volume 2020-2025

million litres	2020	2021	2022	2023	2024	2025
Cola Carbonates	Data removed from sample					
- Low Calorie Cola Carbonates						
- Regular Cola Carbonates						
Non-Cola Carbonates						
- Lemonade/Lime						
- Ginger Ale						
- Tonic Water/Other Bitters						
- Orange Carbonates						
- Other Non-Cola Carbonates						
Carbonates						

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

Table 16 Forecast Off-trade Sales of Carbonates by Category: Value 2020-2025

EUR million	2020	2021	2022	2023	2024	2025
Cola Carbonates	Data removed from sample					
- Low Calorie Cola Carbonates						
- Regular Cola Carbonates						
Non-Cola Carbonates						
- Lemonade/Lime						
- Ginger Ale						
- Tonic Water/Other Bitters						
- Orange Carbonates						
- Other Non-Cola Carbonates						
Carbonates						

Data removed from sample

Carbonates

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

Table 17 Forecast Off-trade Sales of Carbonates by Category: % Volume Growth 2020-2025

% volume growth

2020/21 2020-25 CAGR 2020/25 Total

- Cola Carbonates
- Low Calorie Cola Carbonates
- Regular Cola Carbonates
- Non-Cola Carbonates
- Lemonade/Lime
- Ginger Ale
- Tonic Water/Other Bitters
- Orange Carbonates
- Other Non-Cola Carbonates
- Carbonates

Data removed from sample

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

Table 18 Forecast Off-trade Sales of Carbonates by Category: % Value Growth 2020-2025

% constant value growth

2020/2021 2020-25 CAGR 2020/25 Total

- Cola Carbonates
- Low Calorie Cola Carbonates
- Regular Cola Carbonates
- Non-Cola Carbonates
- Lemonade/Lime
- Ginger Ale
- Tonic Water/Other Bitters
- Orange Carbonates
- Other Non-Cola Carbonates
- Carbonates

Data removed from sample

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

Table 19 Forecast Sales of Carbonates by Total Fountain On-trade: Volume 2020-2025

million litres

2020 2021 2022 2023 2024 2025

Total Fountain On-trade

Data removed from sample

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

Table 20 Forecast Sales of Carbonates by Total Fountain On-trade: % Volume Growth 2020-2025

% fountain volume growth

2020/21 2020-25 CAGR 2020/25 Total

Total Fountain On-trade

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

SOFT DRINKS IN ESTONIA - INDUSTRY OVERVIEW

EXECUTIVE SUMMARY

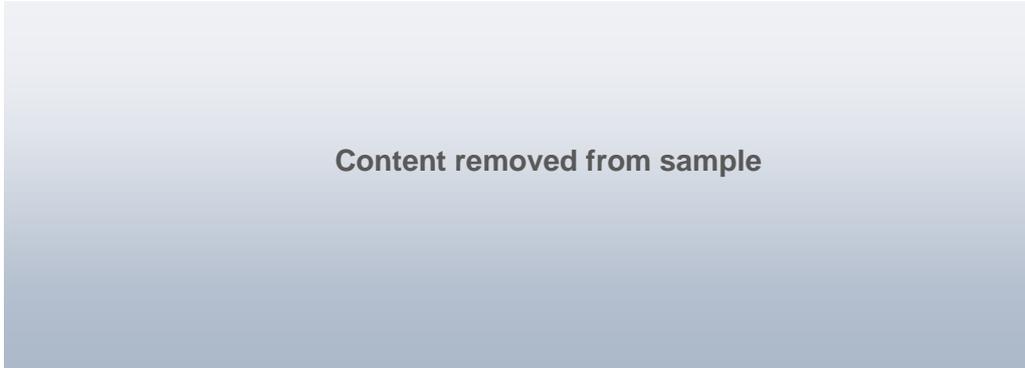
COVID-19 impact on soft drinks

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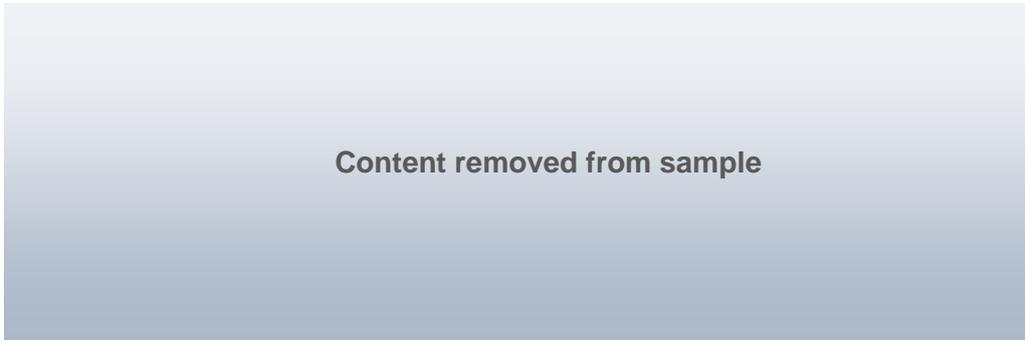
COVID-19 country impact

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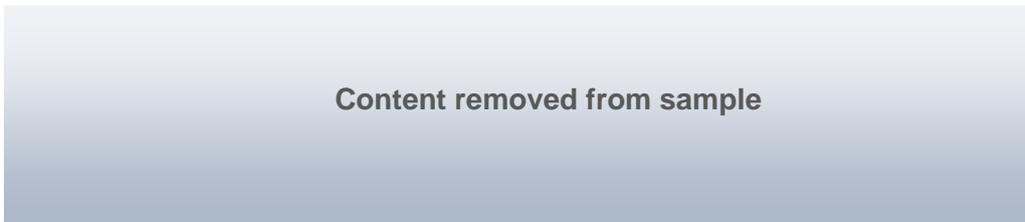
Company response



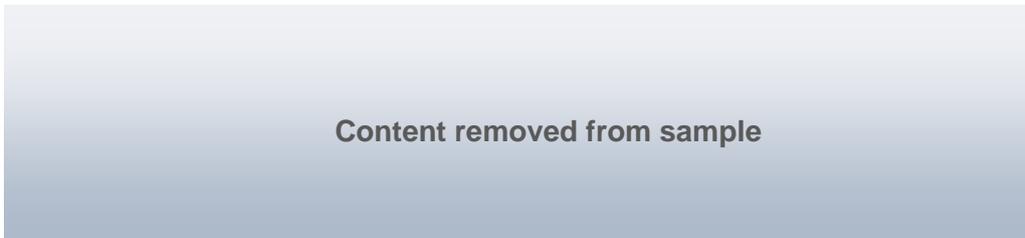
Retailing shift

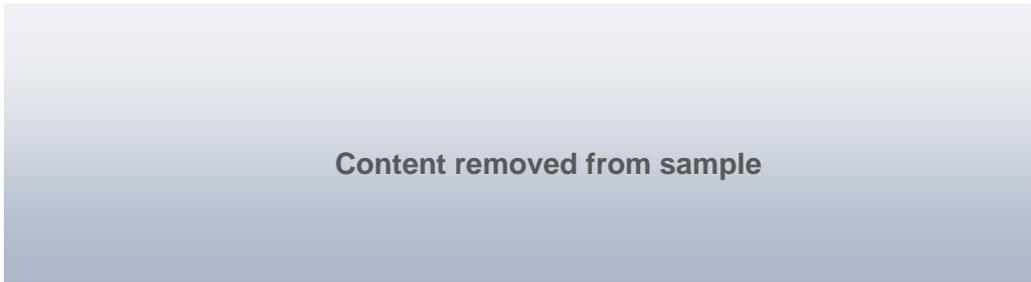


Foodservice vs retail split



What next for soft drinks?





MARKET DATA

Table 21 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	Data removed from sample					
On-trade						
Total						

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

Table 22 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	Data removed from sample		
On-trade			
Total			

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

Table 23 Off-trade vs On-trade Sales of Soft Drinks by Channel: Value 2015-2020

EUR million

	2015	2016	2017	2018	2019	2020
Off-trade	Data removed from sample					
On-trade						
Total						

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

Table 24 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	Data removed from sample		
On-trade			
Total			

Off-trade
On-trade
Total

Data removed from sample

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

Table 25 Off-trade vs On-trade Sales of Soft Drinks (as sold) by Category: Volume 2019

million litres

	Off-trade	On-trade	Total
Bottled Water	Data removed from sample		
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 26 Off-trade vs On-trade Sales of Soft Drinks (as sold) by Category: % Volume 2019

% volume analysis

	Off-trade	On-trade	Total
Bottled Water	Data removed from sample		
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 27 Off-trade vs On-trade Sales of Soft Drinks by Category: Value 2019

EUR million

	Off-trade	On-trade	Total
Bottled Water	Data removed from sample		
Carbonates			
Concentrates			
Juice			

RTD Coffee
 RTD Tea
 Energy Drinks
 Sports Drinks
 Asian Speciality Drinks
 Soft Drinks

Data removed from sample

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

Table 28 Off-trade vs On-trade Sales of Soft Drinks by Category: % Value 2019

% value analysis

	Off-trade	On-trade	Total
Bottled Water	Data removed from sample		
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 29 Off-trade Sales of Soft Drinks (RTD) by Category: Volume 2015-2020

million litres

	2015	2016	2017	2018	2019	2020
Bottled Water	Data removed from sample					
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 30 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	Data removed from sample		
Carbonates			
Concentrates			
Juice			
RTD Coffee			

RTD Tea
 Energy Drinks
 Sports Drinks
 Asian Speciality Drinks
 Soft Drinks

Data removed from sample

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

Table 31 Off-trade Sales of Soft Drinks by Category: Value 2015-2020

EUR million

	2015	2016	2017	2018	2019	2020
Bottled Water	Data removed from sample					
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 32 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	Data removed from sample		
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 33 Sales of Soft Drinks by Total Fountain On-trade: Volume 2015-2020

million litres

	2015	2016	2017	2018	2019	2020
Total Fountain On-trade	Data removed from sample					

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

Table 34 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	Data removed from sample		

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

Table 35 NBO Company Shares of Off-trade Soft Drinks (RTD): % Volume 2016-2020

% off-trade volume Company	2016	2017	2018	2019	2020
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Data removed from sample

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

Table 36 LBN Brand Shares of Off-trade Soft Drinks (RTD): % Volume 2017-2020

% off-trade volume Brand (GBO)	Company (NBO)	2017	2018	2019	2020
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Data removed from sample

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

Table 37 NBO Company Shares of Off-trade Soft Drinks: % 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 38 LBN Brand Shares of Off-trade Soft Drinks: % Value 2017-2020

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

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Data removed from sample

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

Table 39 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	Data removed from sample					
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 40 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	Data removed from sample					
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 41 Distribution of Off-trade Soft Drinks (as sold) by Format: % Volume 2015-2020

% off-trade	2015	2016	2017	2018	2019	2020
Store-Based Retailing	Data removed from sample					
- 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

Table 42 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	Data removed from sample					
- 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
- 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

Data removed from sample

- 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 43 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	Data removed from sample					
On-trade						
Total						

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

Table 44 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	Data removed from sample		
On-trade			
Total			

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

Table 45 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	Data removed from sample					
On-trade						
Total						

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

Table 46 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	Data removed from sample		
On-trade			
Total			

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

Table 47 Forecast Off-trade Sales of Soft Drinks (RTD) by Category: Volume 2020-2025

million litres	2020	2021	2022	2023	2024	2025
Bottled Water	Data removed from sample					
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 48 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	Data removed from sample		
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 49 Forecast Off-trade Sales of Soft Drinks by Category: Value 2020-2025

EUR million	2020	2021	2022	2023	2024	2025
Bottled Water	Data removed from sample					
Carbonates						
Concentrates						
Juice						
RTD Coffee						

RTD Tea
 Energy Drinks
 Sports Drinks
 Asian Speciality Drinks
 Soft Drinks

Data removed from sample

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

Table 50 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	Data removed from sample		
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 51 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	Data removed from sample					

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

Table 52 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	Data removed from sample		

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

GLOBAL MACROECONOMIC ENVIRONMENT

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GLOBAL INDUSTRY ENVIRONMENT

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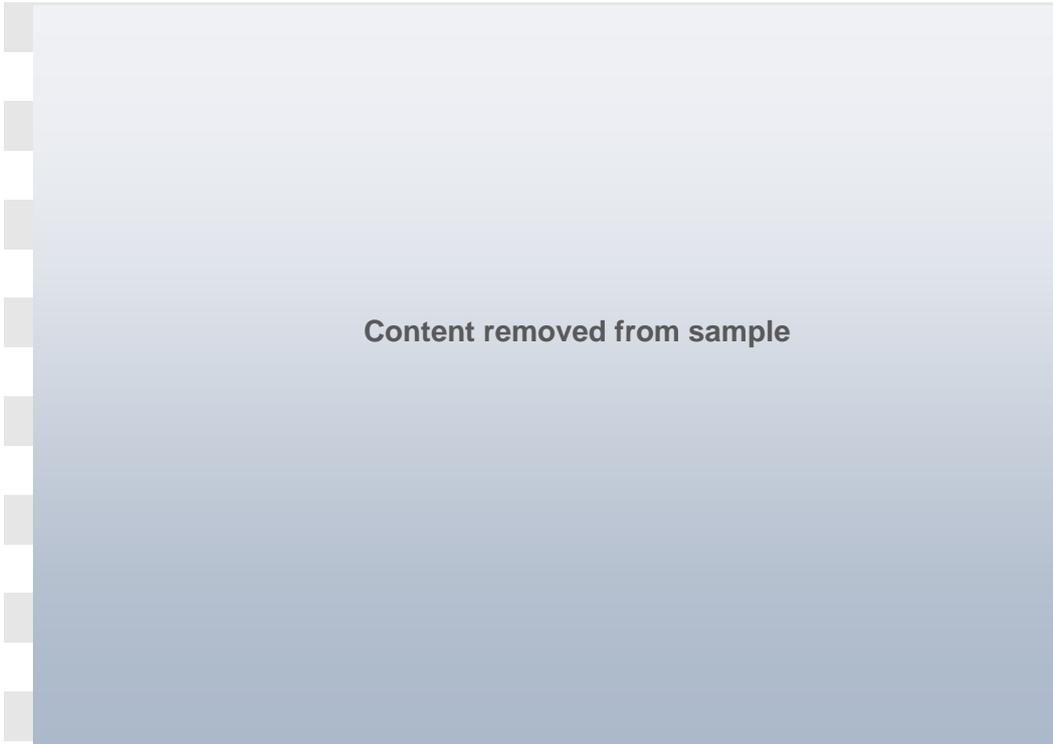
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SOURCES

Sources used during the research included the following:

Summary 1 Research Sources

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Source: Euromonitor International