



Passport

Juice in Estonia

Euromonitor International

January 2021

This sample report is for illustration
purposes only.

Some content and data have been
changed.

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LIST OF CONTENTS AND TABLES

Juice in Estonia - Category Analysis	1
KEY DATA FINDINGS.....	1
2020 IMPACT.....	1
Deepening health and wellness trend negatively impacting juice sales in 2020	1
Strong brand awareness and fresher image supports local players	1
Channel shifts in 2020 benefit e-commerce and other grocery retailers	1
RECOVERY AND OPPORTUNITIES	2
Shift to healthier alternatives will benefit not from concentrate juice and coconut and other plant waters	2
Some recovery in 2021 will help juice record growth over the forecast period, but challenges remain.....	2
Domestic producers expected to adapt to developing trends with new product development ..	2
CATEGORY DATA.....	2
Table 1 Off-trade Sales of Juice by Category: Volume 2015-2020	2
Table 2 Off-trade Sales of Juice by Category: Value 2015-2020	3
Table 3 Off-trade Sales of Juice by Category: % Volume Growth 2015-2020.....	3
Table 4 Off-trade Sales of Juice by Category: % Value Growth 2015-2020.....	3
Table 5 NBO Company Shares of Off-trade Juice: % Volume 2016-2020	4
Table 6 LBN Brand Shares of Off-trade Juice: % Volume 2017-2020.....	4
Table 7 NBO Company Shares of Off-trade Juice: % Value 2016-2020	5
Table 8 LBN Brand Shares of Off-trade Juice: % Value 2017-2020.....	5
Table 9 Forecast Off-trade Sales of Juice by Category: Volume 2020-2025	6
Table 10 Forecast Off-trade Sales of Juice by Category: Value 2020-2025	6
Table 11 Forecast Off-trade Sales of Juice by Category: % Volume Growth 2020-2025.....	7
Table 12 Forecast Off-trade Sales of Juice by Category: % Value Growth 2020- 2025	7
Soft Drinks in Estonia - Industry Overview	8
EXECUTIVE SUMMARY	8
COVID-19 impact on soft drinks	8
COVID-19 country impact.....	8
Company response.....	9
Retailing shift	9
Foodservice vs retail split	9
What next for soft drinks?	9
MARKET DATA.....	10
Table 13 Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: Volume 2015-2020.....	10
Table 14 Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: % Volume Growth 2015-2020	10
Table 15 Off-trade vs On-trade Sales of Soft Drinks by Channel: Value 2015- 2020	10
Table 16 Off-trade vs On-trade Sales of Soft Drinks by Channel: % Value Growth 2015-2020	10
Table 17 Off-trade vs On-trade Sales of Soft Drinks (as sold) by Category: Volume 2019.....	11

Table 18	Off-trade vs On-trade Sales of Soft Drinks (as sold) by Category: % Volume 2019.....	11
Table 19	Off-trade vs On-trade Sales of Soft Drinks by Category: Value 2019.....	11
Table 20	Off-trade vs On-trade Sales of Soft Drinks by Category: % Value 2019.....	12
Table 21	Off-trade Sales of Soft Drinks (RTD) by Category: Volume 2015-2020.....	12
Table 22	Off-trade Sales of Soft Drinks (RTD) by Category: % Volume Growth 2015-2020.....	12
Table 23	Off-trade Sales of Soft Drinks by Category: Value 2015-2020	13
Table 24	Off-trade Sales of Soft Drinks by Category: % Value Growth 2015-2020	13
Table 25	Sales of Soft Drinks by Total Fountain On-trade: Volume 2015-2020.....	13
Table 26	Sales of Soft Drinks by Total Fountain On-trade: % Volume Growth 2015-2020.....	13
Table 27	NBO Company Shares of Off-trade Soft Drinks (RTD): % Volume 2016-2020.....	14
Table 28	LBN Brand Shares of Off-trade Soft Drinks (RTD): % Volume 2017-2020	14
Table 29	NBO Company Shares of Off-trade Soft Drinks: % Value 2016-2020.....	16
Table 30	LBN Brand Shares of Off-trade Soft Drinks: % Value 2017-2020	16
Table 31	Penetration of Private Label in Off-trade Soft Drinks (RTD) by Category: % Volume 2015-2020	17
Table 32	Penetration of Private Label in Off-trade Soft Drinks by Category: % Value 2015-2020.....	18
Table 33	Distribution of Off-trade Soft Drinks (as sold) by Format: % Volume 2015-2020.....	18
Table 34	Distribution of Off-trade Soft Drinks (as sold) by Format and Category: % Volume 2020.....	19
Table 35	Forecast Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: Volume 2020-2025	20
Table 36	Forecast Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: % Volume Growth 2020-2025.....	20
Table 37	Forecast Off-trade vs On-trade Sales of Soft Drinks by Channel: Value 2020-2025.....	20
Table 38	Forecast Off-trade vs On-trade Sales of Soft Drinks by Channel: % Value Growth 2020-2025	20
Table 39	Forecast Off-trade Sales of Soft Drinks (RTD) by Category: Volume 2020-2025.....	21
Table 40	Forecast Off-trade Sales of Soft Drinks (RTD) by Category: % Volume Growth 2020-2025	21
Table 41	Forecast Off-trade Sales of Soft Drinks by Category: Value 2020-2025	21
Table 42	Forecast Off-trade Sales of Soft Drinks by Category: % Value Growth 2020-2025.....	22
Table 43	Forecast Sales of Soft Drinks by Total Fountain On-trade: Volume 2020-2025.....	22
Table 44	Forecast Sales of Soft Drinks by Total Fountain On-trade: % Volume Growth 2020-2025	22
	GLOBAL MACROECONOMIC ENVIRONMENT.....	22
	GLOBAL INDUSTRY ENVIRONMENT	23
	DISCLAIMER	23

SOURCES..... 23
 Summary 1 Research Sources..... 24

JUICE IN ESTONIA - CATEGORY ANALYSIS

KEY DATA FINDINGS

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2020 IMPACT

Deepening health and wellness trend negatively impacting juice sales in 2020

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Strong brand awareness and fresher image supports local players

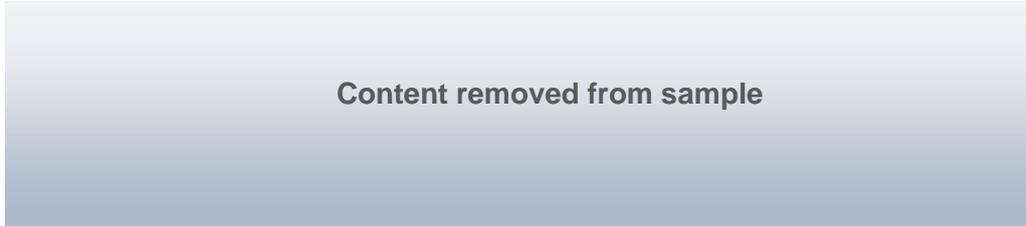
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Channel shifts in 2020 benefit e-commerce and other grocery retailers

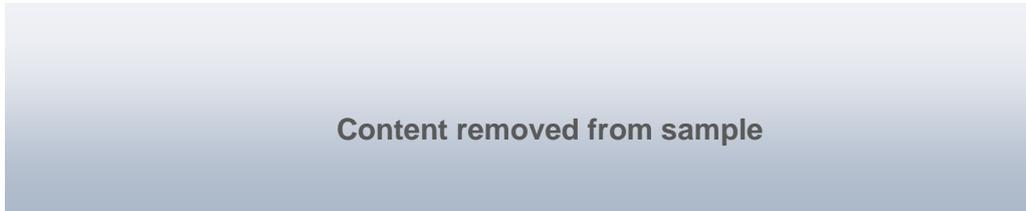
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RECOVERY AND OPPORTUNITIES

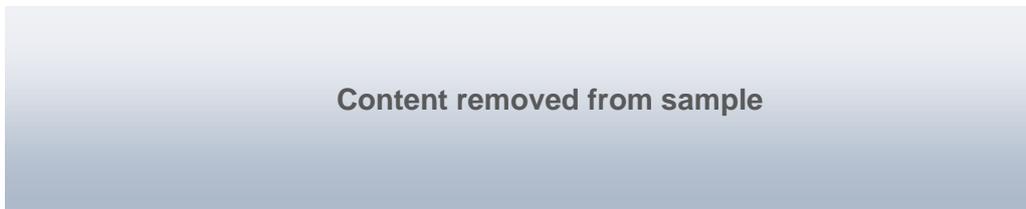
Shift to healthier alternatives will benefit not from concentrate juice and coconut and other plant waters



Some recovery in 2021 will help juice record growth over the forecast period, but challenges remain



Domestic producers expected to adapt to developing trends with new product development



CATEGORY DATA

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

million litres	2015	2016	2017	2018	2019	2020
100% Juice	Data removed from sample					
- Not from Concentrate						
100% Juice						
- Reconstituted 100%						
Juice						
Juice Drinks (up to 24%						
Juice)						
Nectars						
Coconut and Other Plant						
Waters						

Juice

Data removed from sample

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

Table 2 Off-trade Sales of Juice by Category: Value 2015-2020

EUR million	2015	2016	2017	2018	2019	2020
100% Juice	Data removed from sample					
- Not from Concentrate 100% Juice						
- Reconstituted 100% Juice						
Juice Drinks (up to 24% Juice)						
Nectars						
Coconut and Other Plant Waters						
Juice						

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

Table 3 Off-trade Sales of Juice by Category: % Volume Growth 2015-2020

% volume growth	2019/20	2015-20 CAGR	2015/20 Total
100% Juice	Data removed from sample		
- Not from Concentrate 100% Juice			
- Reconstituted 100% Juice			
Juice Drinks (up to 24% Juice)			
Nectars			
Coconut and Other Plant Waters			
Juice			

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

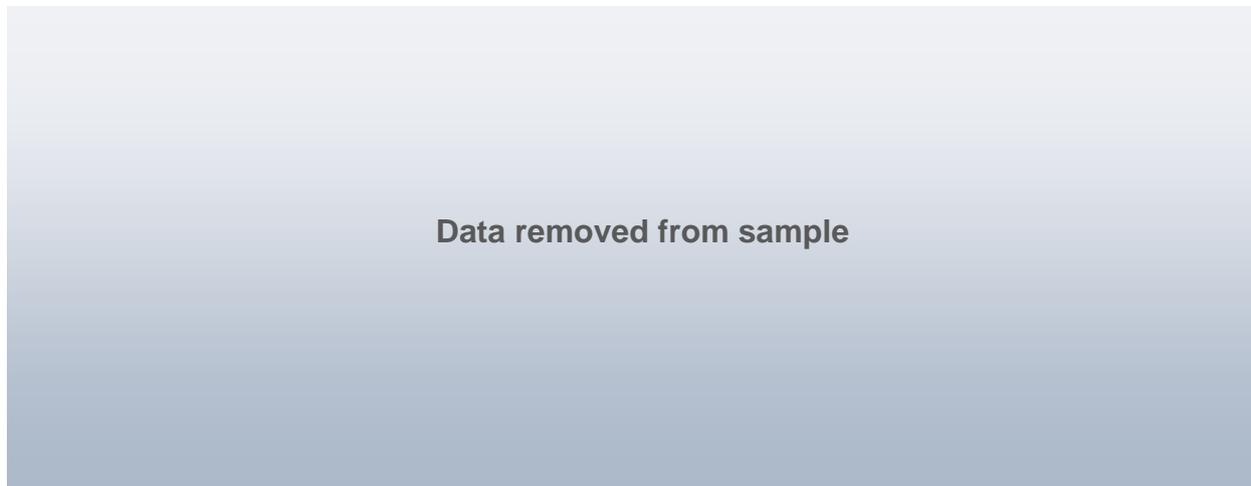
Table 4 Off-trade Sales of Juice by Category: % Value Growth 2015-2020

% current value growth	2019/20	2015-20 CAGR	2015/20 Total
100% Juice	Data removed from sample		
- Not from Concentrate 100% Juice			
- Reconstituted 100% Juice			
Juice Drinks (up to 24% Juice)			
Nectars			
Coconut and Other Plant Waters			
Juice			

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 Juice: % Volume 2016-2020

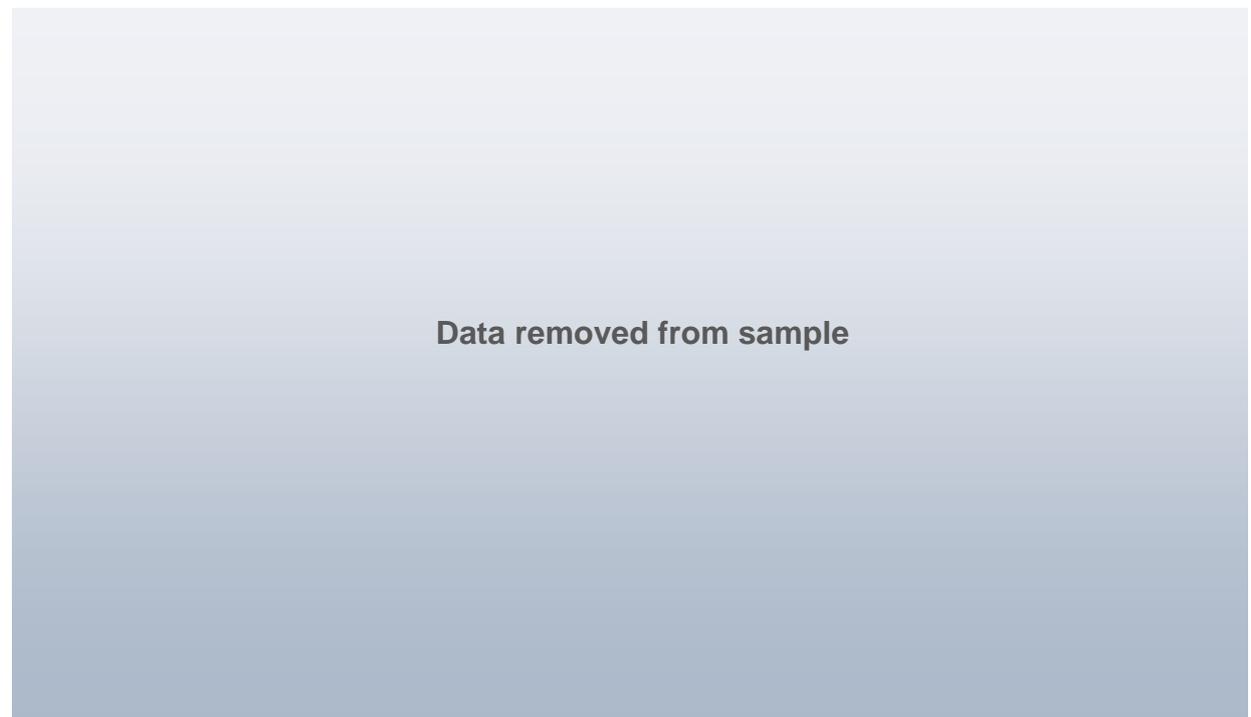
% off-trade volume Company	2016	2017	2018	2019	2020
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Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 6 LBN Brand Shares of Off-trade Juice: % 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 7 NBO Company Shares of Off-trade Juice: % Value 2016-2020

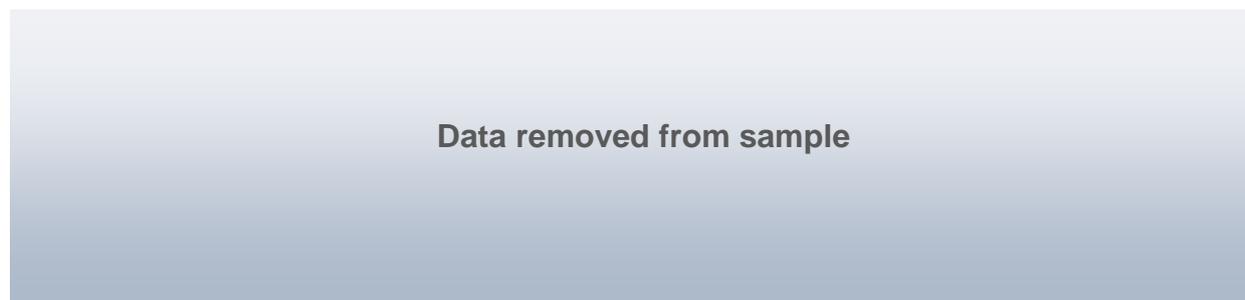
% off-trade value rsp Company	2016	2017	2018	2019	2020
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Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 8 LBN Brand Shares of Off-trade Juice: % 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 9 Forecast Off-trade Sales of Juice by Category: Volume 2020-2025

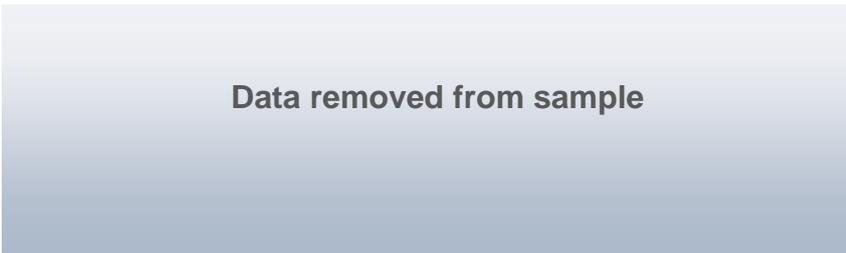
million litres	2020	2021	2022	2023	2024	2025
100% Juice	Data removed from sample					
- Not from Concentrate						
100% Juice						
- Reconstituted 100% Juice						
Juice Drinks (up to 24% Juice)						
Nectars						
Coconut and Other Plant Waters						
Juice						

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

Table 10 Forecast Off-trade Sales of Juice by Category: Value 2020-2025

EUR million	2020	2021	2022	2023	2024	2025
100% Juice	Data removed from sample					
- Not from Concentrate						

100% Juice
 - Reconstituted 100% Juice
 Juice Drinks (up to 24% Juice)
 Nectars
 Coconut and Other Plant Waters
 Juice



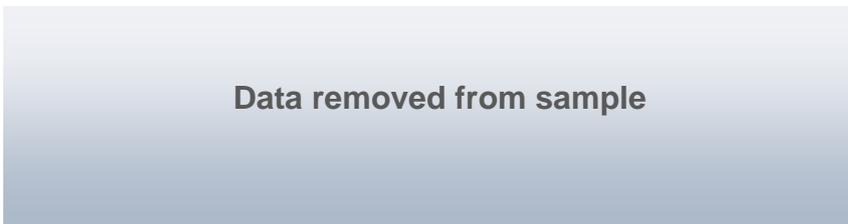
Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

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

% volume growth

2020/21 2020-25 CAGR 2020/25 Total

100% Juice
 - Not from Concentrate 100% Juice
 - Reconstituted 100% Juice
 Juice Drinks (up to 24% Juice)
 Nectars
 Coconut and Other Plant Waters
 Juice



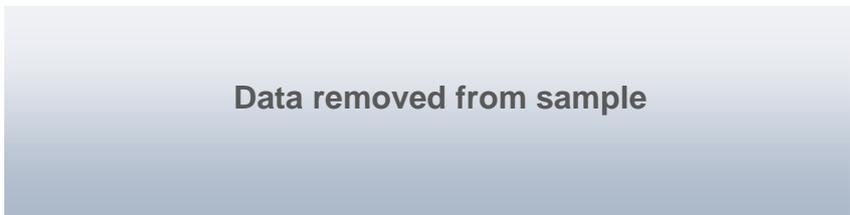
Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

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

% constant value growth

2020/2021 2020-25 CAGR 2020/25 Total

100% Juice
 - Not from Concentrate 100% Juice
 - Reconstituted 100% Juice
 Juice Drinks (up to 24% Juice)
 Nectars
 Coconut and Other Plant Waters
 Juice



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

SOFT DRINKS IN ESTONIA - INDUSTRY OVERVIEW

EXECUTIVE SUMMARY

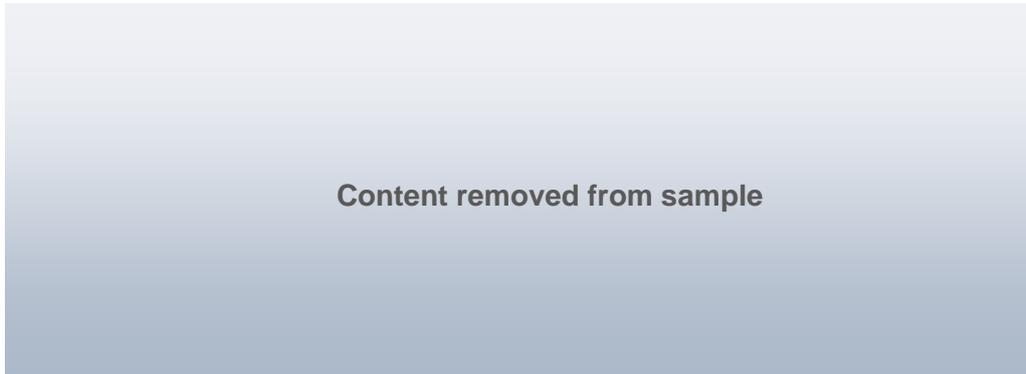
COVID-19 impact on soft drinks

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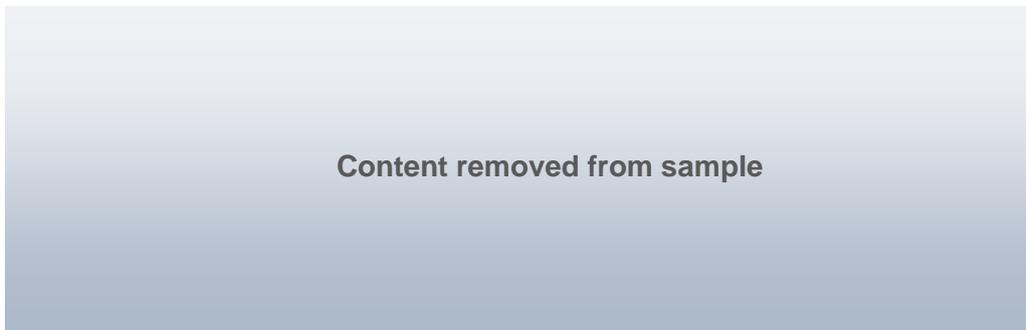
COVID-19 country impact

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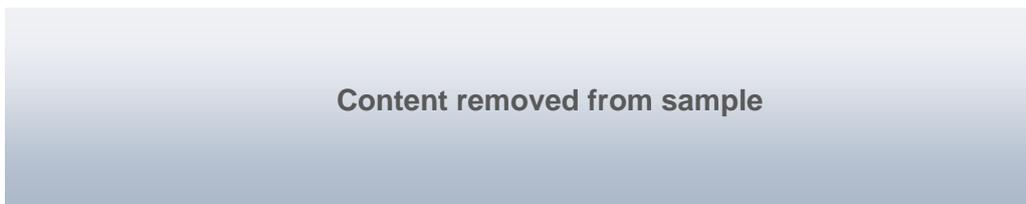
Company response



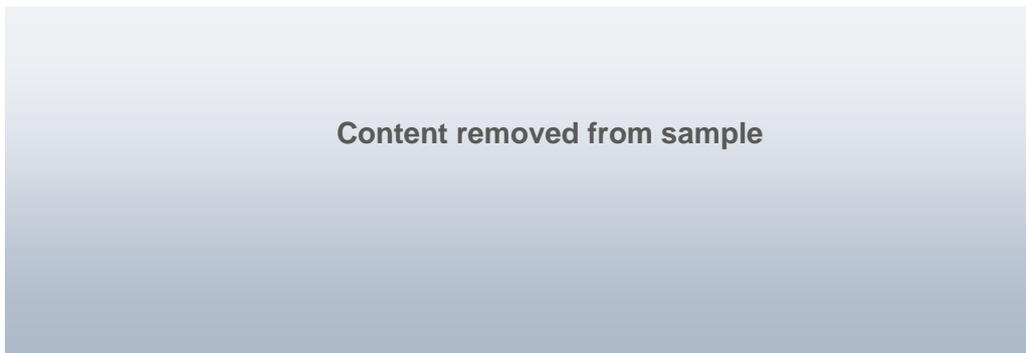
Retailing shift

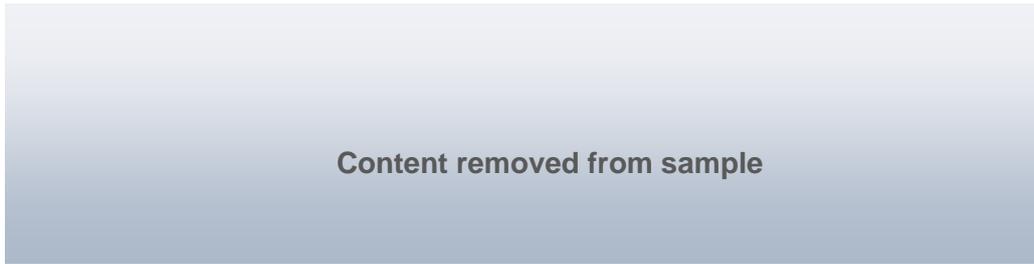


Foodservice vs retail split



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	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 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	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 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	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 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	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 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	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 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	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 19 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			

Data removed from sample

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	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 21 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 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	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 23 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 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	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 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	Data removed from sample					

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

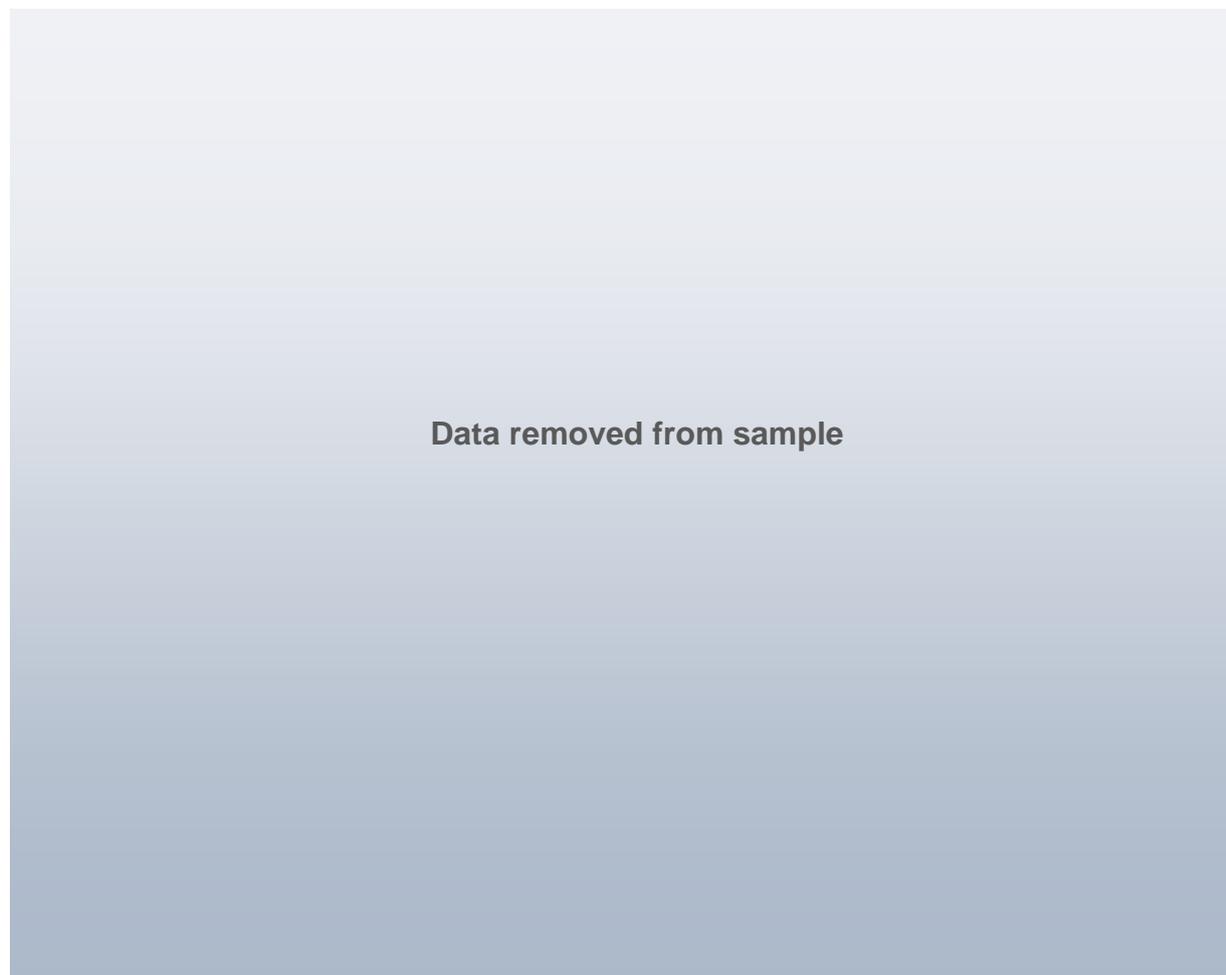
Table 26 Sales of Soft Drinks by Total Fountain On-trade: % Volume Growth 2015-2020

% fountain volume growth	2019/20	2015-20 CAGR	2015/20 Total
Total Fountain On-trade	Data removed from sample		

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

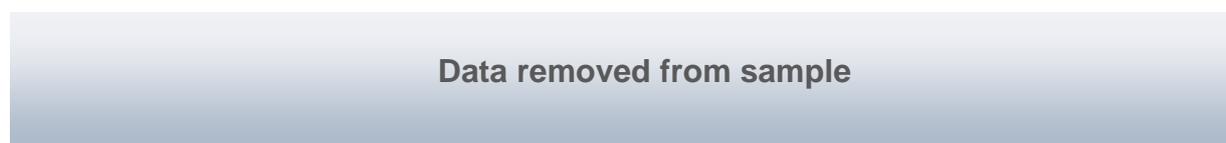
% off-trade volume Company	2016	2017	2018	2019	2020
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Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

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
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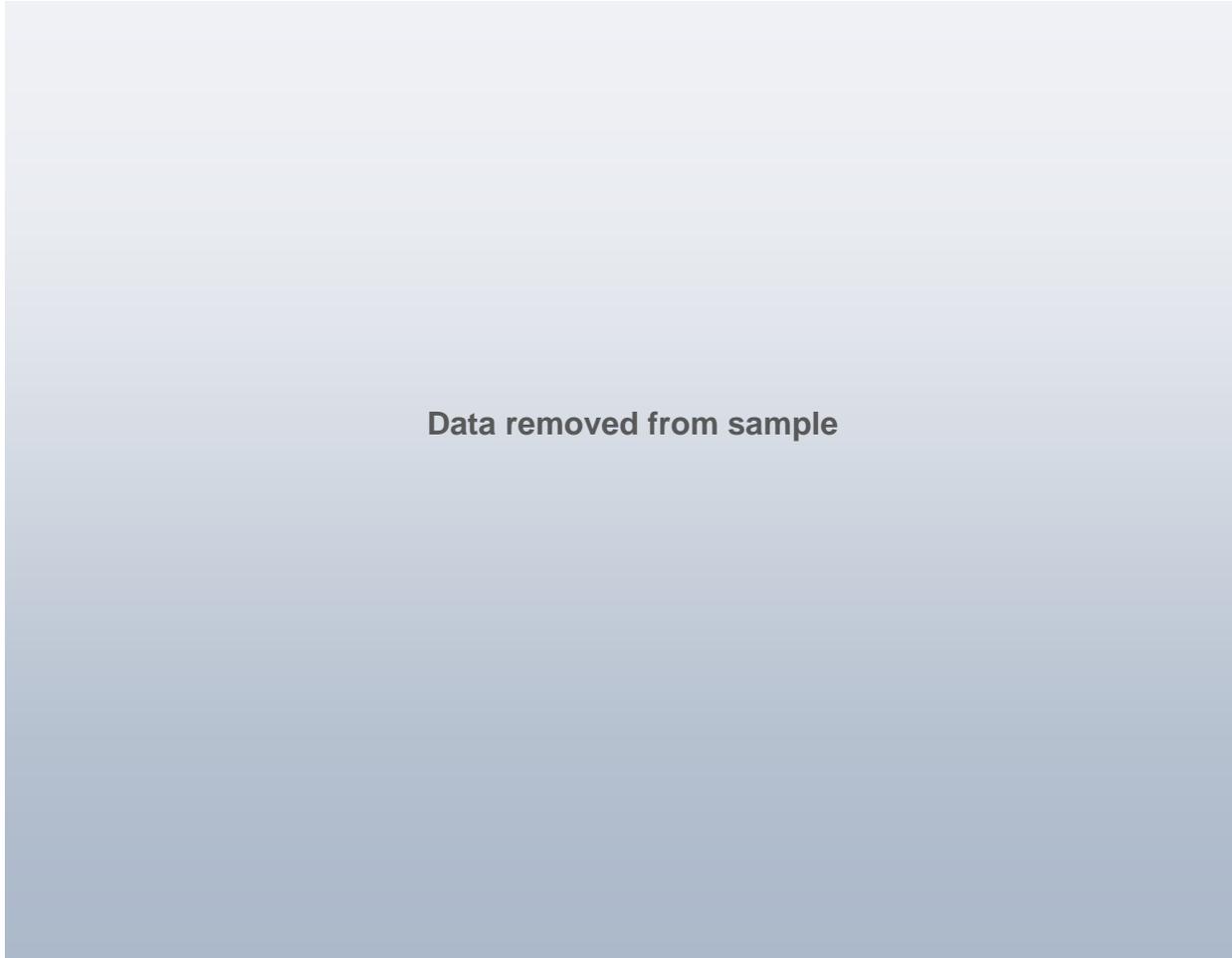


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Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

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

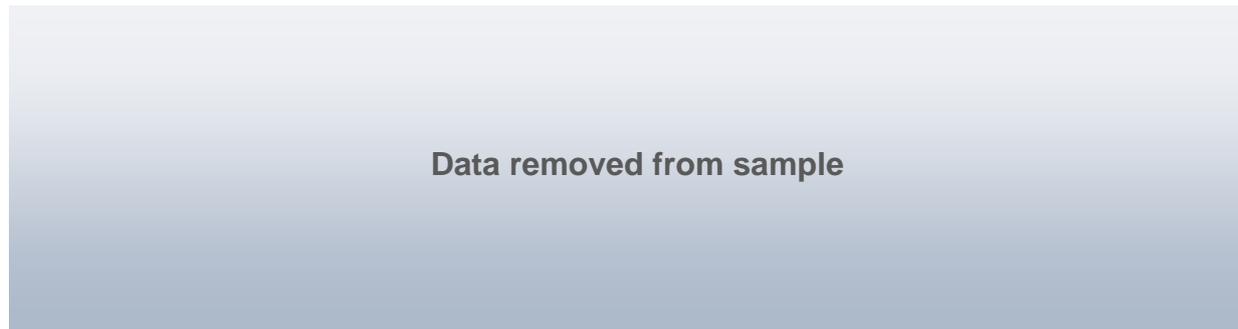
% off-trade value rsp Company	2016	2017	2018	2019	2020
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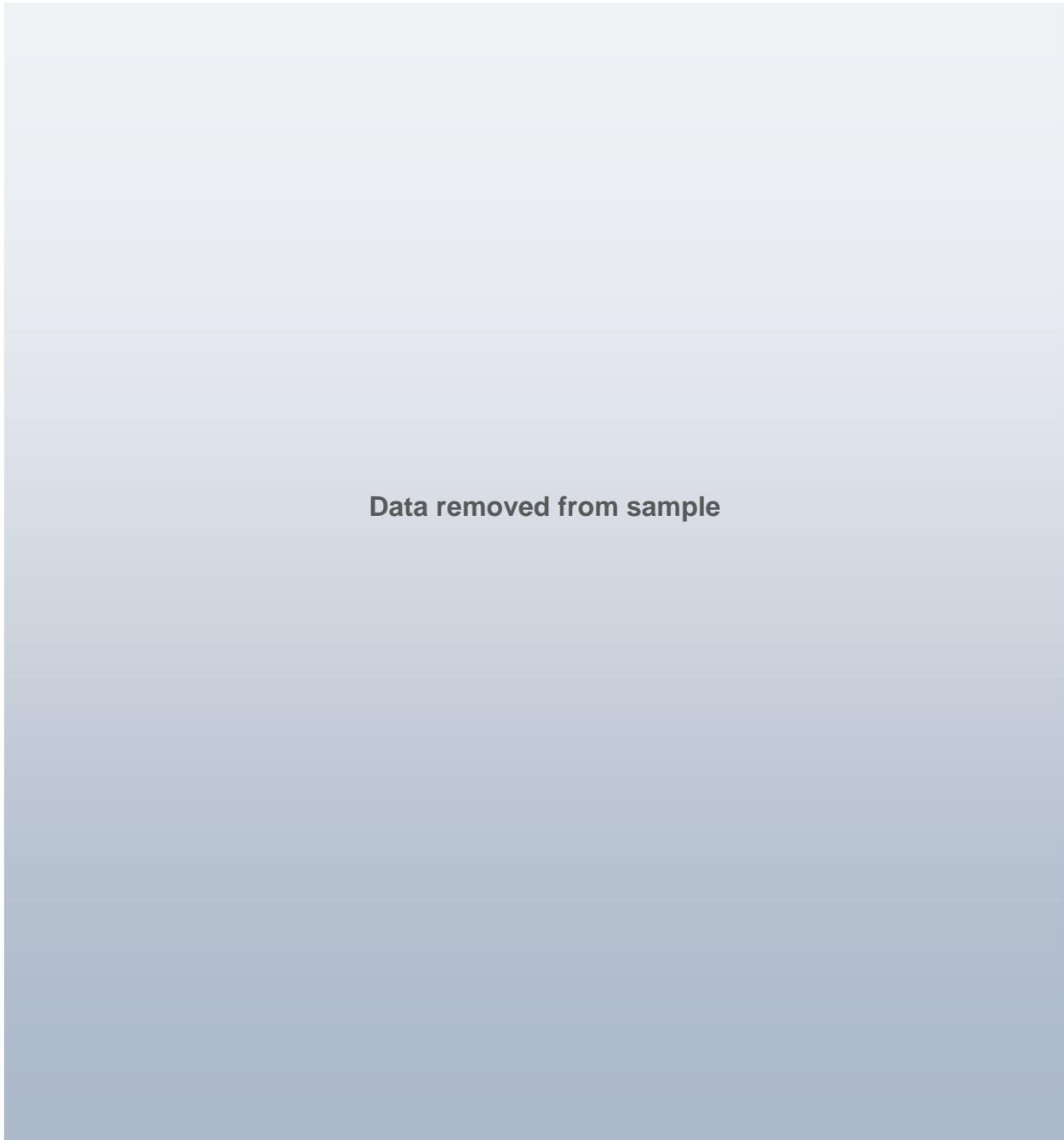


Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

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	Data removed from sample					
Carbonates						
Concentrates						

Juice
RTD Tea
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 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	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 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	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						

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	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	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			

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	Data removed from sample					
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	Data removed from sample		
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	Data removed from sample					
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	Data removed from sample		
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	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 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	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 41 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						

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	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 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	Data removed from sample					

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	Data removed from sample		

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

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SOURCES

Sources used during the research included the following:

Summary 1 Research Sources

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