



Passport

RTD Coffee in Estonia

Euromonitor International

January 2021

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purposes only.

Some content and data have been
changed.

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RTD COFFEE IN ESTONIA - CATEGORY ANALYSIS

KEY DATA FINDINGS

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2020 IMPACT

Rising demand for convenience fuelling interest among consumers

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New product developments fuel dynamic growth within RTD coffee

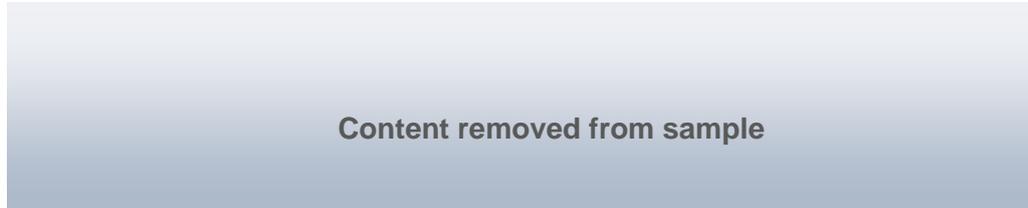
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Paulig Coffee Estonia takes the lead in off-trade value terms in 2020

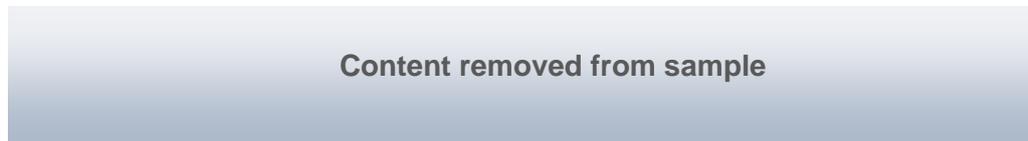
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RECOVERY AND OPPORTUNITIES

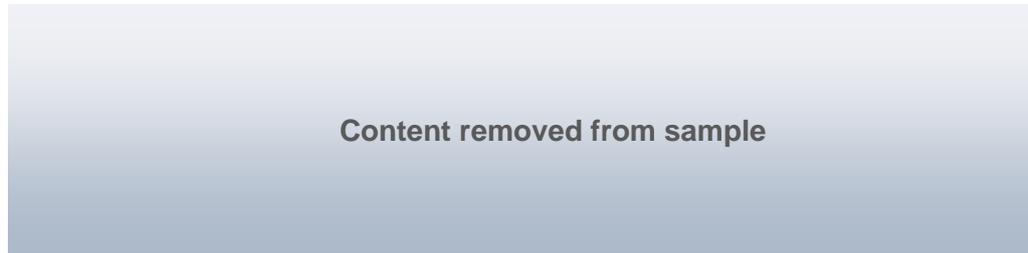
Prospects for on-trade sales remain bleak unless awareness rises



Increasingly hot summers bode well for sales of RTD coffee in the future



Improved positioning across more retail channels offers RTD coffee scope for growth



CATEGORY DATA

Table 1 Off-trade Sales of RTD Coffee: Volume 2015-2020

'000 litres

	2015	2016	2017	2018	2019	2020
RTD Coffee	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 RTD Coffee: Value 2015-2020

EUR '000

	2015	2016	2017	2018	2019	2020

RTD Coffee

Data removed from sample

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

Table 3 Off-trade Sales of RTD Coffee: % Volume Growth 2015-2020

% volume growth

2019/20	2015-20 CAGR	2015/20 Total
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RTD Coffee

Data removed from sample

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

Table 4 Off-trade Sales of RTD Coffee: % Value Growth 2015-2020

% current value growth

2019/20	2015-20 CAGR	2015/20 Total
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RTD Coffee

Data removed from sample

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 RTD Coffee: % Volume 2016-2020

% off-trade volume

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 6 LBN Brand Shares of Off-trade RTD Coffee: % Volume 2017-2020

% off-trade volume

Brand (GBO)	Company (NBO)	2017	2018	2019	2020
-------------	---------------	------	------	------	------

Data removed from sample

Data removed from sample

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 RTD Coffee: % 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 RTD Coffee: % 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 RTD Coffee: Volume 2020-2025

'000 litres

	2020	2021	2022	2023	2024	2025
RTD Coffee	Data removed from sample					

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

Table 10 Forecast Off-trade Sales of RTD Coffee: Value 2020-2025

EUR '000

	2020	2021	2022	2023	2024	2025
RTD Coffee	Data removed from sample					

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

Table 11 Forecast Off-trade Sales of RTD Coffee: % Volume Growth 2020-2025

% volume growth

	2020/21	2020-25 CAGR	2020/25 Total
RTD Coffee	Data removed from sample		

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

Table 12 Forecast Off-trade Sales of RTD Coffee: % Value Growth 2020-2025

% constant value growth

	2020/2021	2020-25 CAGR	2020/25 Total
RTD Coffee	Data removed from sample		

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

SOFT DRINKS IN ESTONIA - INDUSTRY OVERVIEW

EXECUTIVE SUMMARY

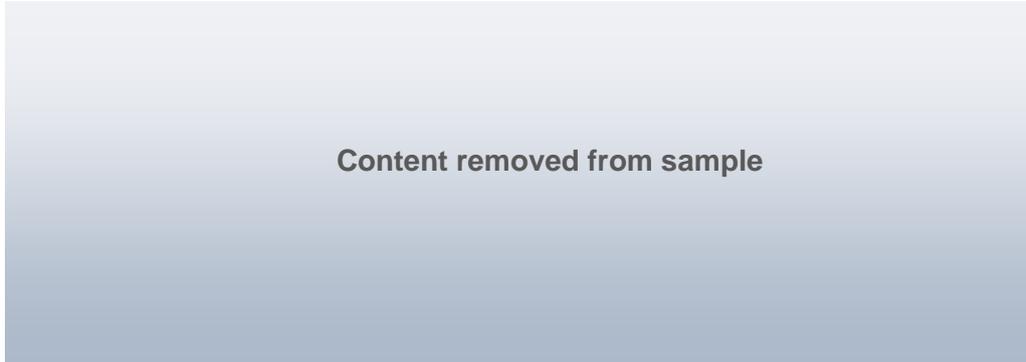
COVID-19 impact on soft drinks

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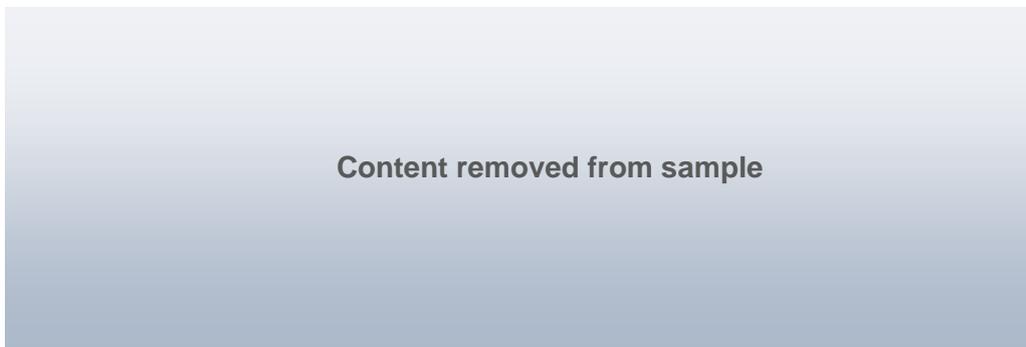
COVID-19 country impact

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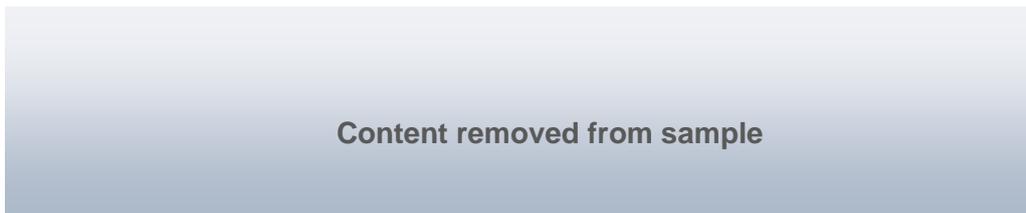
Company response



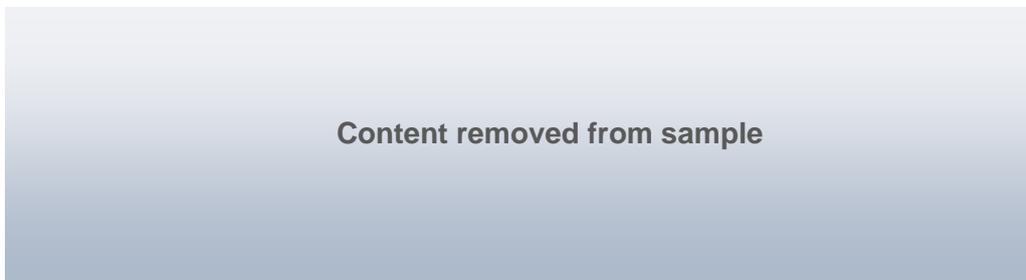
Retailing shift



Foodservice vs retail split



What next for soft drinks?



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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
 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 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

Data removed from sample

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

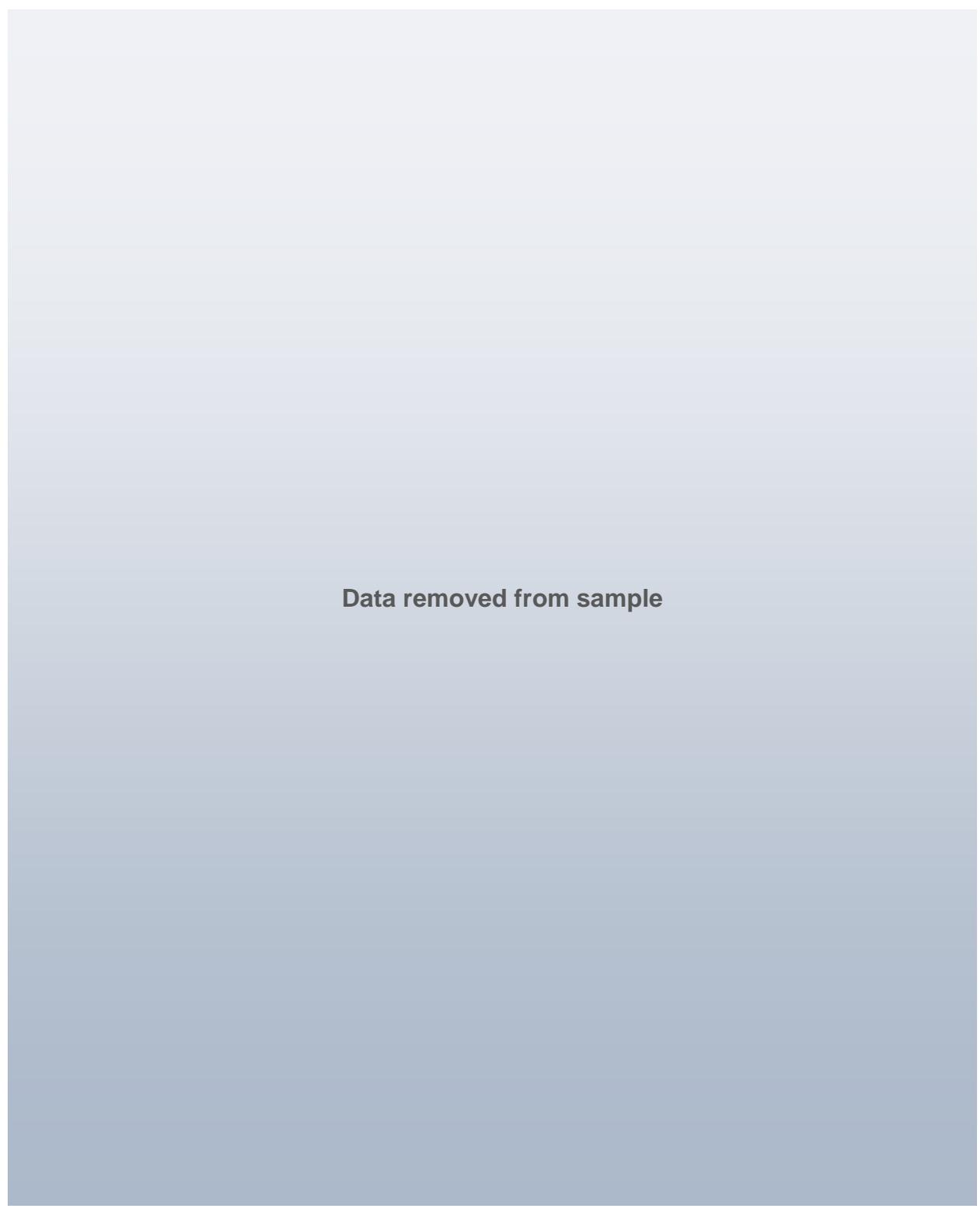
% off-trade volume

Company	2016	2017	2018	2019	2020
Data removed from sample					

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

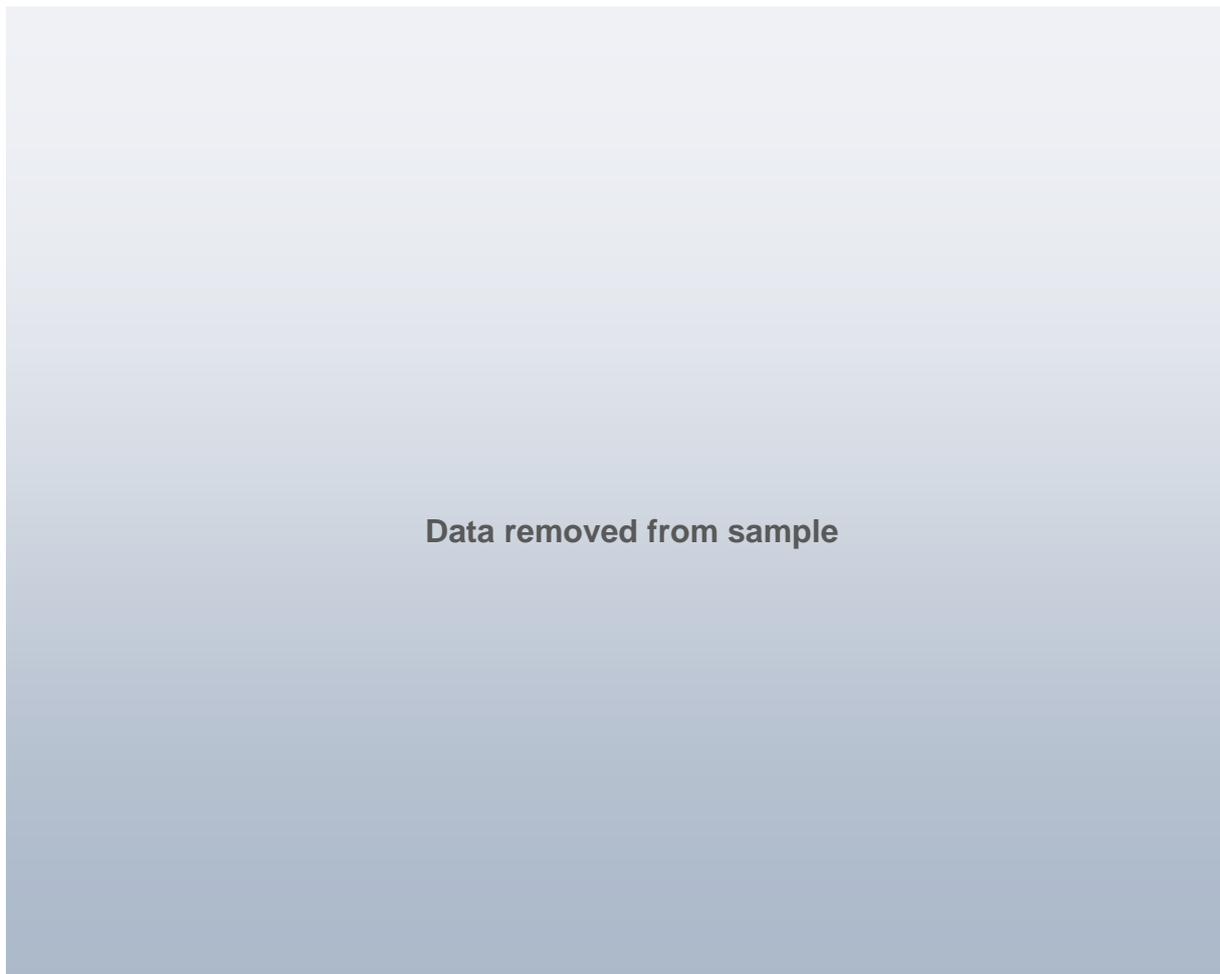
% off-trade volume Brand (GBO)	Company (NBO)	2017	2018	2019	2020
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Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

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

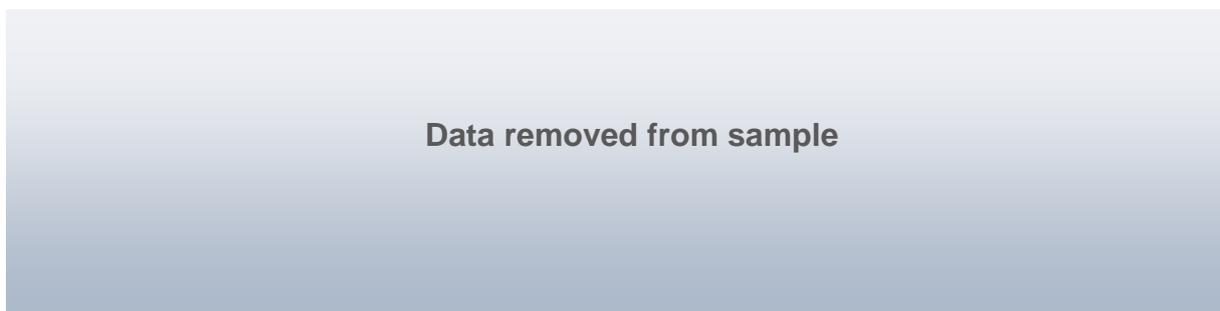
% off-trade value rsp Company	2016	2017	2018	2019	2020
----------------------------------	------	------	------	------	------



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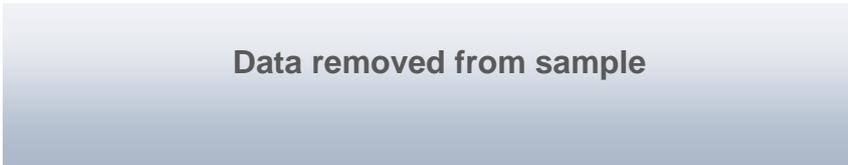
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Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 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
Carbonates
Concentrates
Juice
RTD Tea
Soft Drinks



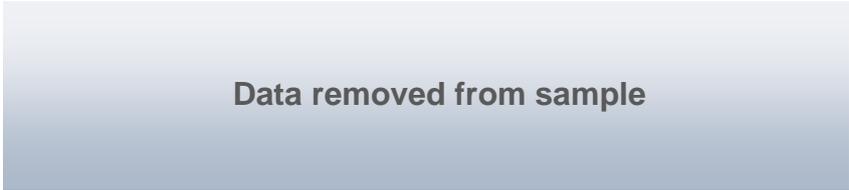
Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

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
Carbonates
Concentrates
Juice
RTD Tea
Soft Drinks



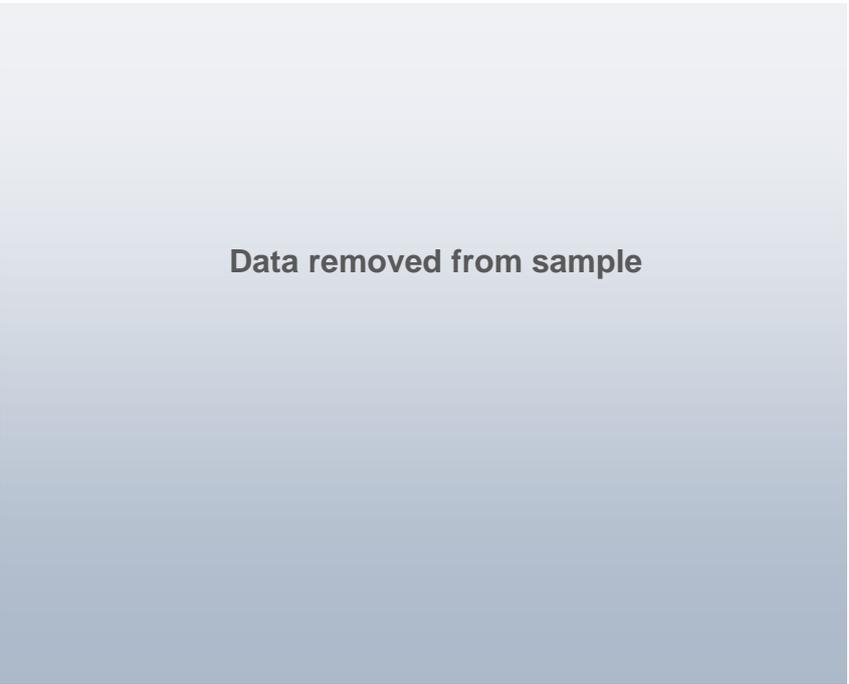
Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

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
- 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			

Data removed from sample	
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	Data removed from sample					
Total	Data removed from sample					
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	Data removed from sample		
Total	Data removed from sample		
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	Data removed from sample					
Total	Data removed from sample					
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	Data removed from sample		
Total	Data removed from sample		
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

GLOBAL MACROECONOMIC ENVIRONMENT

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GLOBAL INDUSTRY ENVIRONMENT

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DISCLAIMER

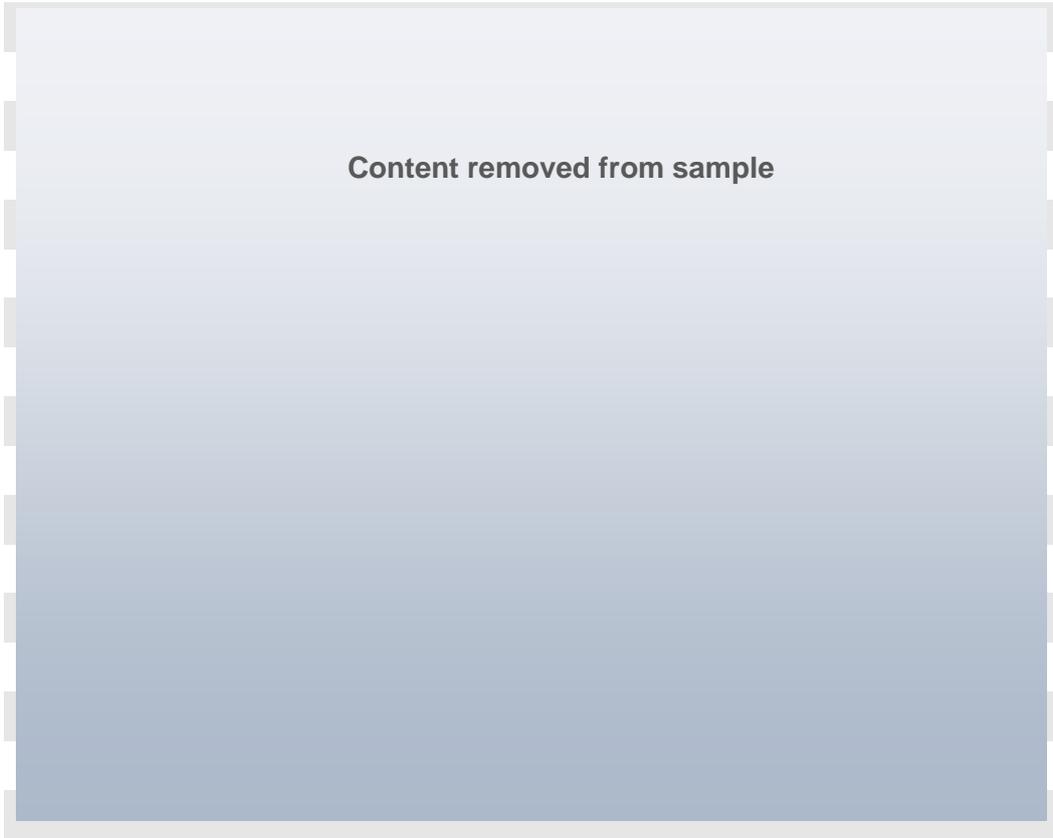
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SOURCES

Sources used during the research included the following:

Summary 1 Research Sources

Content removed from sample



Source: Euromonitor International