



Passport

RTD Tea 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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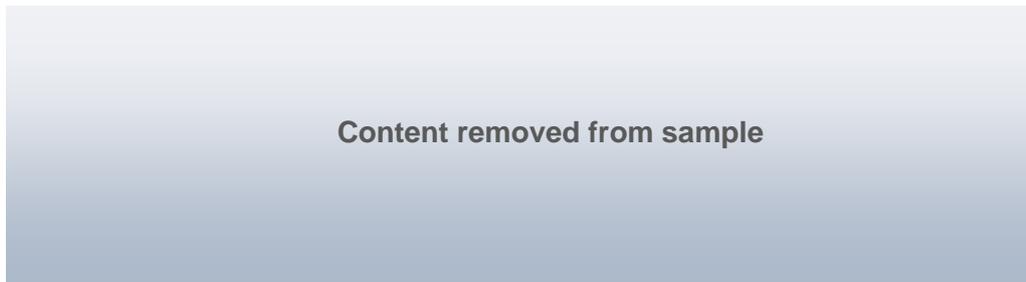
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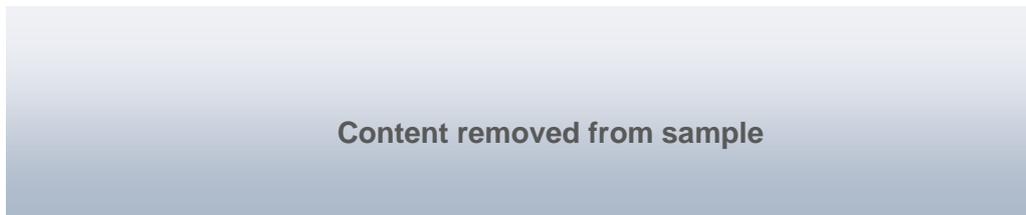
RTD TEA IN ESTONIA - CATEGORY ANALYSIS

KEY DATA FINDINGS

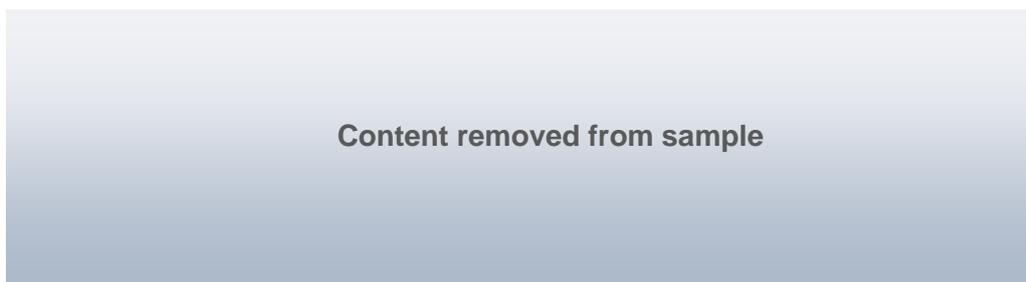


2020 IMPACT

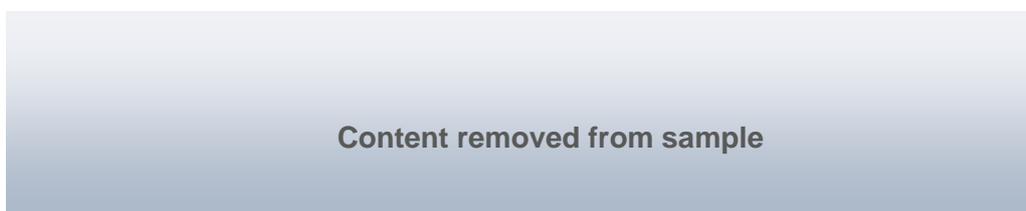
RTD tea remains niche in Estonia and struggles to weather the storm in 2020



Fuze Tea dominates in A category targeting younger consumers



Premiumisation on hold in 2020 as consumer purchasing power weakens



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RECOVERY AND OPPORTUNITIES

Potential implementation of sugar tax threatens retail sales, but resumption of on-trade sales will boost growth

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Weak product selection to continue limiting sales in an arena dominated by Fuze Tea

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Health and wellness trend to impact new product development in RTD tea in the future

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CATEGORY DATA

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

million litres

	2015	2016	2017	2018	2019	2020
Carbonated RTD Tea and Kombucha Still RTD Tea	Data removed from sample					

RTD Tea

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 Tea by Category: Value 2015-2020

EUR million

	2015	2016	2017	2018	2019	2020
Carbonated RTD Tea and Kombucha Still RTD Tea RTD Tea	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 Tea by Category: % Volume Growth 2015-2020

% volume growth

	2019/20	2015-20 CAGR	2015/20 Total
Carbonated RTD Tea and Kombucha Still RTD Tea RTD Tea	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 Tea by Category: % Value Growth 2015-2020

% current value growth

	2019/20	2015-20 CAGR	2015/20 Total
Carbonated RTD Tea and Kombucha Still RTD Tea RTD Tea	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 Tea: % Volume 2016-2020

% off-trade volume

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

% off-trade value rsp 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 8 LBN Brand Shares of Off-trade RTD Tea: % 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 RTD Tea by Category: Volume 2020-2025

million litres	2020	2021	2022	2023	2024	2025
Carbonated RTD Tea and Kombucha Still RTD Tea RTD Tea	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 Tea by Category: Value 2020-2025

EUR million	2020	2021	2022	2023	2024	2025
Carbonated RTD Tea and Kombucha Still RTD Tea RTD Tea	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 Tea by Category: % Volume Growth 2020-2025

% volume growth	2020/21	2020-25 CAGR	2020/25 Total
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Carbonated RTD Tea and Kombucha
 Still RTD Tea
 RTD Tea

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 Tea by Category: % Value Growth 2020-2025

% constant value growth

2020/2021 2020-25 CAGR 2020/25 Total

Carbonated RTD Tea and Kombucha
 Still RTD Tea
 RTD Tea

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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

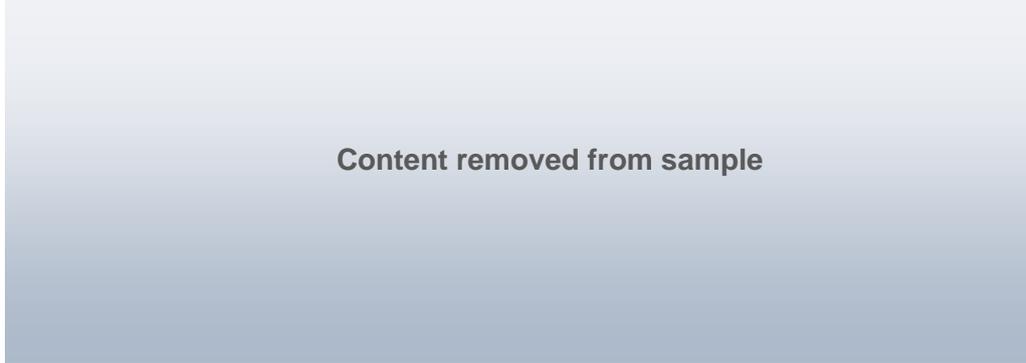
COVID-19 impact on soft drinks

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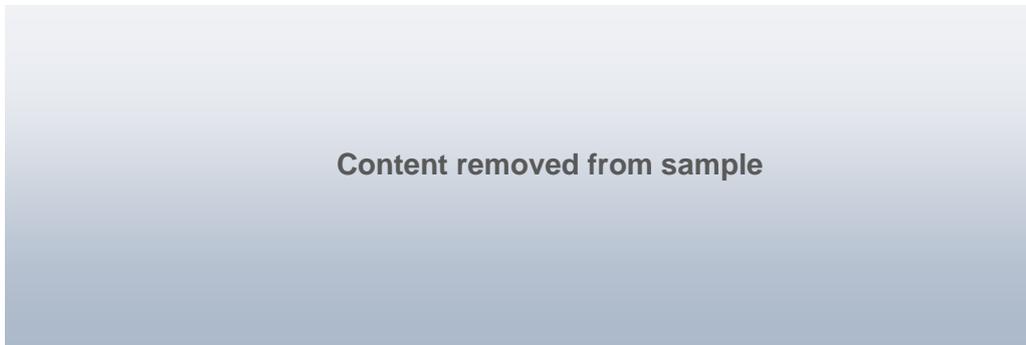
COVID-19 country impact

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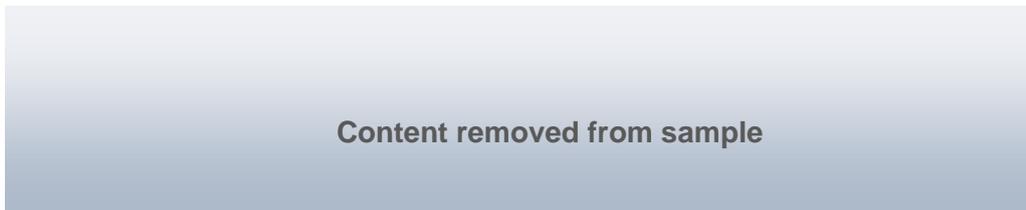
Company response



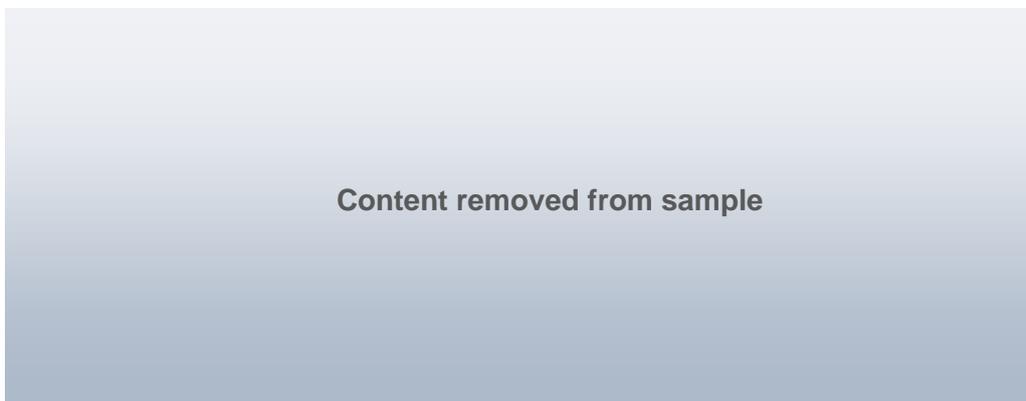
Retailing shift



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			

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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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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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 29 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 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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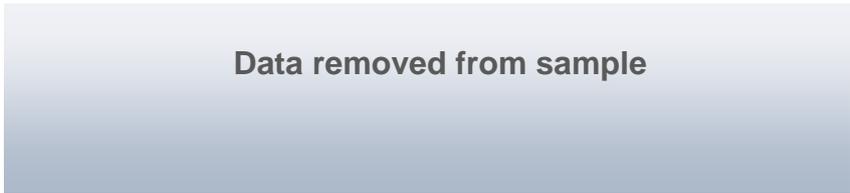
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Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

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
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Bottled Water
Carbonates
Concentrates
Juice
RTD Tea
Soft Drinks



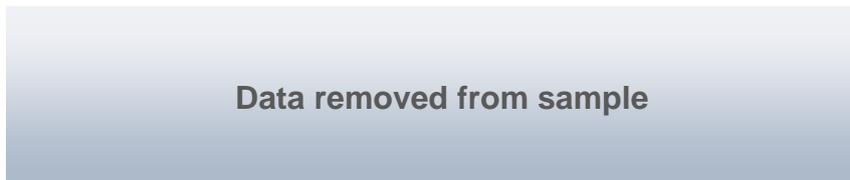
Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

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



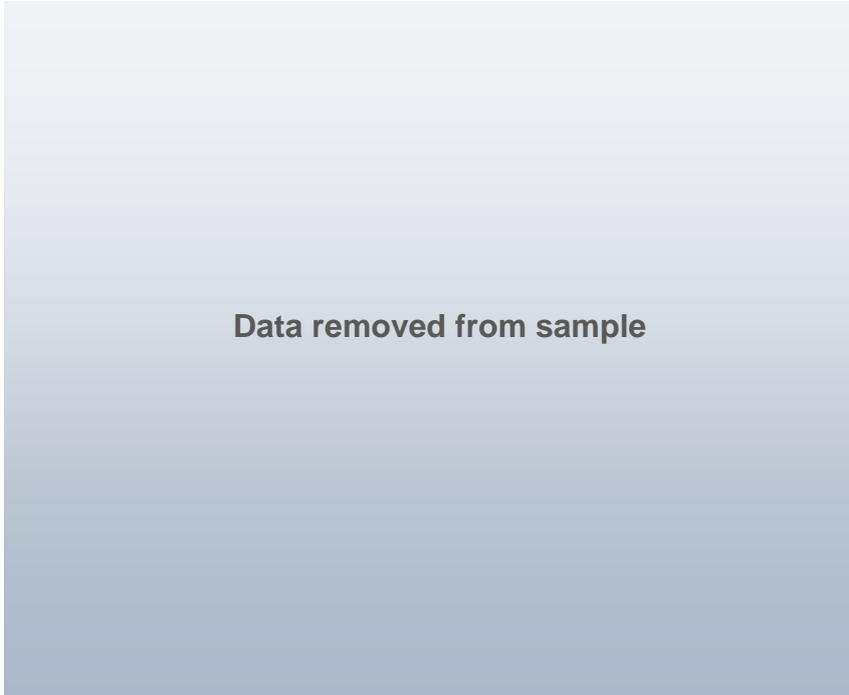
Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

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						
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

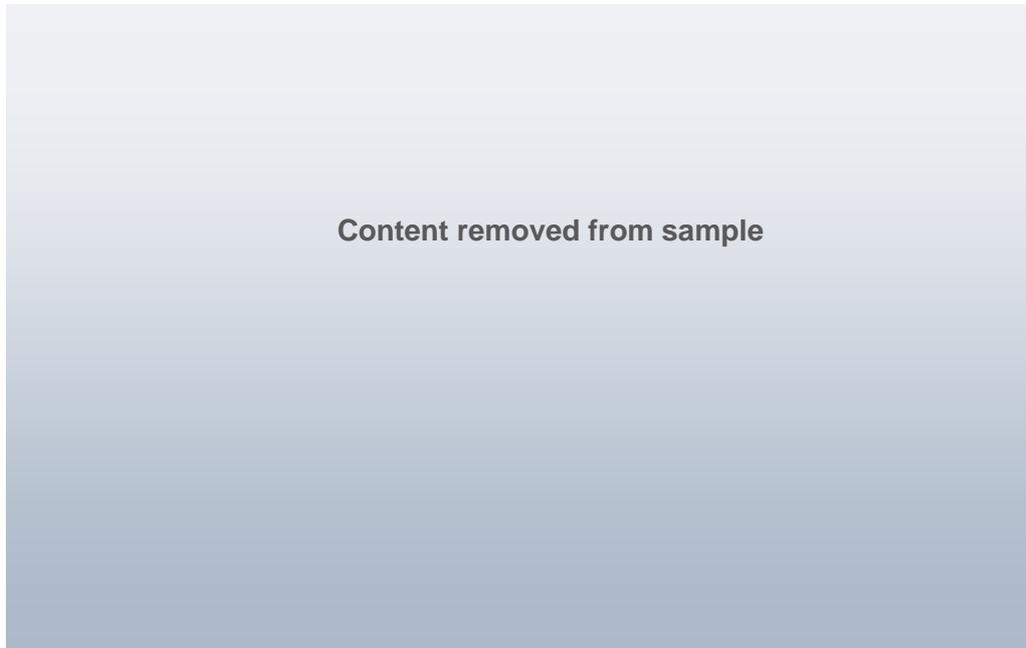
% fountain volume growth	2020/21	2020-25 CAGR	2020/25 Total
Total Fountain On-trade	Data removed from sample		

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

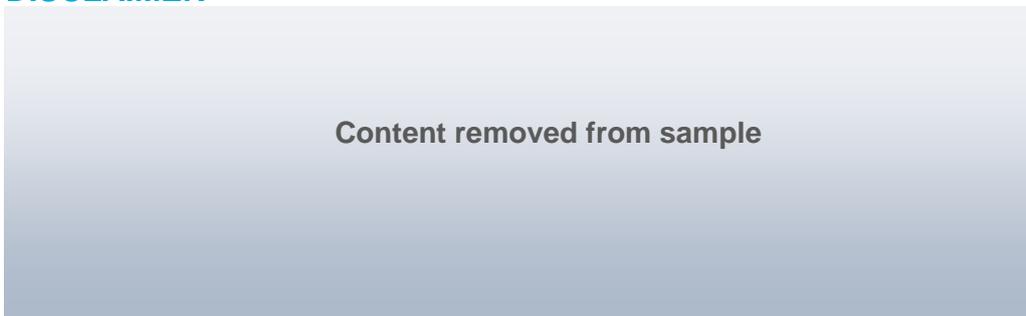
GLOBAL MACROECONOMIC ENVIRONMENT

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GLOBAL INDUSTRY ENVIRONMENT



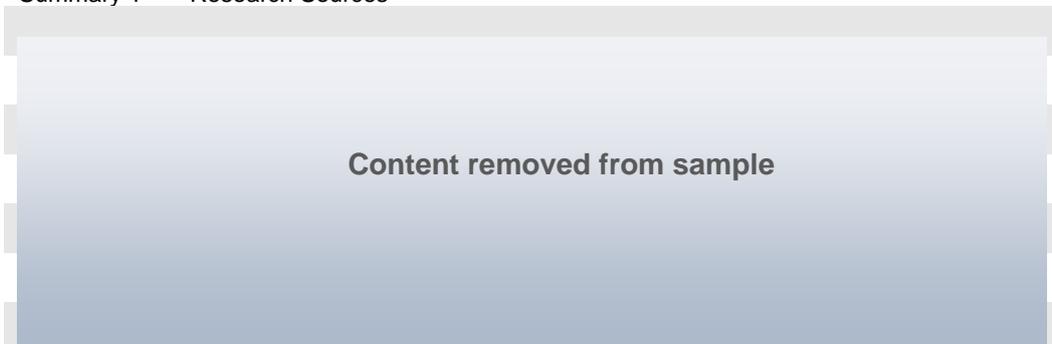
DISCLAIMER



SOURCES

Sources used during the research included the following:

Summary 1 Research Sources



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Source: Euromonitor International