



# Passport

## Sports Drinks in Estonia

Euromonitor International

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This sample report is for illustration  
purposes only.

Some content and data have been  
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# SPORTS DRINKS IN ESTONIA - CATEGORY ANALYSIS

## KEY DATA FINDINGS

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## 2020 IMPACT

Closure of sports facilities and lockdown hits sports drinks hard in 2020

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Local origins and strong promotion help ensure A Le Coq's continued dominance

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Shifts in consumer behaviour boost isotonic drinks and e-commerce

Content removed from sample

## RECOVERY AND OPPORTUNITIES

Demand for sports drinks will be boosted by increasingly hot summer temperatures

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Scope for strong growth in A developing category, as Estonians embrace sporting activity

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Functional bottled water poses A threat, but sports drink players can rise to the challenge

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## CATEGORY DATA

Table 1 Off-trade Sales of Sports Drinks: Volume 2015-2020

million litres

|               | 2015                     | 2016 | 2017 | 2018 | 2019 | 2020 |
|---------------|--------------------------|------|------|------|------|------|
| Sports Drinks | 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 Sports Drinks: Value 2015-2020

EUR million

|               | 2015                            | 2016 | 2017 | 2018 | 2019 | 2020 |
|---------------|---------------------------------|------|------|------|------|------|
| Sports Drinks | <b>Data removed from sample</b> |      |      |      |      |      |

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

Table 3 Off-trade Sales of Sports Drinks: % Volume Growth 2015-2020

% volume growth

|               | 2019/20                         | 2015-20 CAGR | 2015/20 Total |
|---------------|---------------------------------|--------------|---------------|
| Sports Drinks | <b>Data removed from sample</b> |              |               |

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

Table 4 Off-trade Sales of Sports Drinks: % Value Growth 2015-2020

% current value growth

|               | 2019/20                         | 2015-20 CAGR | 2015/20 Total |
|---------------|---------------------------------|--------------|---------------|
| Sports Drinks | <b>Data removed from sample</b> |              |               |

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

Table 5 NBO Company Shares of Off-trade Sports Drinks: % Volume 2016-2020

% off-trade volume

| Company                         | 2016 | 2017 | 2018 | 2019 | 2020 |
|---------------------------------|------|------|------|------|------|
| <b>Data removed from sample</b> |      |      |      |      |      |

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

Table 6 LBN Brand Shares of Off-trade Sports Drinks: % Volume 2017-2020

% off-trade volume

| Brand (GBO)                     | Company (NBO) | 2017 | 2018 | 2019 | 2020 |
|---------------------------------|---------------|------|------|------|------|
| <b>Data removed from sample</b> |               |      |      |      |      |

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

**Table 7 NBO Company Shares of Off-trade Sports Drinks: % Value 2016-2020**

| % off-trade value rsp<br>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 Sports Drinks: % Value 2017-2020**

| % off-trade value rsp<br>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 Sports Drinks: Volume 2020-2025**

| million litres | 2020 | 2021 | 2022 | 2023 | 2024 | 2025 |
|----------------|------|------|------|------|------|------|
|----------------|------|------|------|------|------|------|

Sports Drinks

**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 Sports Drinks: Value 2020-2025**

| EUR million | 2020 | 2021 | 2022 | 2023 | 2024 | 2025 |
|-------------|------|------|------|------|------|------|
|-------------|------|------|------|------|------|------|

Sports Drinks

**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 Sports Drinks: % Volume Growth 2020-2025**

% volume growth

2020/21      2020-25 CAGR      2020/25 Total

Sports Drinks

**Data removed from sample**

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

**Table 12 Forecast Off-trade Sales of Sports Drinks: % Value Growth 2020-2025**

% constant value growth

2020/2021      2020-25 CAGR      2020/25 Total

Sports Drinks

**Data removed from sample**

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

Content removed from sample

## Retailing shift

Content removed from sample

## Foodservice vs retail split

Content removed from sample

## What next for soft drinks?

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Content removed from sample

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

million litres

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

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

Note: Excludes powder concentrates

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

% volume analysis

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

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

Note: Excludes powder concentrates

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

EUR million

|               | Off-trade                       | On-trade | Total |
|---------------|---------------------------------|----------|-------|
| Bottled Water | <b>Data removed from sample</b> |          |       |
| Carbonates    |                                 |          |       |
| Concentrates  |                                 |          |       |
| Juice         |                                 |          |       |

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

**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           | <b>Data removed from sample</b> |          |       |
| Carbonates              |                                 |          |       |
| Concentrates            |                                 |          |       |
| Juice                   |                                 |          |       |
| RTD Coffee              |                                 |          |       |
| RTD Tea                 |                                 |          |       |
| Energy Drinks           |                                 |          |       |
| Sports Drinks           |                                 |          |       |
| Asian Speciality Drinks |                                 |          |       |
| Soft Drinks             |                                 |          |       |

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

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

million litres

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

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

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

% volume growth

|               | 2019/20                         | 2015-20 CAGR | 2015/20 Total |
|---------------|---------------------------------|--------------|---------------|
| Bottled Water | <b>Data removed from sample</b> |              |               |
| Carbonates    |                                 |              |               |
| Concentrates  |                                 |              |               |
| Juice         |                                 |              |               |
| RTD Coffee    |                                 |              |               |

RTD Tea  
Energy Drinks  
Sports Drinks  
Asian Speciality Drinks  
Soft Drinks

**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           | <b>Data removed from sample</b> |      |      |      |      |      |
| Carbonates              |                                 |      |      |      |      |      |
| Concentrates            |                                 |      |      |      |      |      |
| Juice                   |                                 |      |      |      |      |      |
| RTD Coffee              |                                 |      |      |      |      |      |
| RTD Tea                 |                                 |      |      |      |      |      |
| Energy Drinks           |                                 |      |      |      |      |      |
| Sports Drinks           |                                 |      |      |      |      |      |
| Asian Speciality Drinks |                                 |      |      |      |      |      |
| Soft Drinks             |                                 |      |      |      |      |      |

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

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

% current value growth

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

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

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

million litres

|                         | 2015                            | 2016 | 2017 | 2018 | 2019 | 2020 |
|-------------------------|---------------------------------|------|------|------|------|------|
| Total Fountain On-trade | <b>Data removed from sample</b> |      |      |      |      |      |

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

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

% fountain volume growth

2019/20 2015-20 CAGR 2015/20 Total

Total Fountain On-trade

**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

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

| % retail rtd volume | 2015                            | 2016 | 2017 | 2018 | 2019 | 2020 |
|---------------------|---------------------------------|------|------|------|------|------|
| Bottled Water       | <b>Data removed from sample</b> |      |      |      |      |      |
| Carbonates          |                                 |      |      |      |      |      |
| Concentrates        |                                 |      |      |      |      |      |
| Juice               |                                 |      |      |      |      |      |
| RTD Tea             |                                 |      |      |      |      |      |
| Soft Drinks         |                                 |      |      |      |      |      |

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

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

| % retail value rsp | 2015                            | 2016 | 2017 | 2018 | 2019 | 2020 |
|--------------------|---------------------------------|------|------|------|------|------|
| Bottled Water      | <b>Data removed from sample</b> |      |      |      |      |      |
| Carbonates         |                                 |      |      |      |      |      |
| Concentrates       |                                 |      |      |      |      |      |
| Juice              |                                 |      |      |      |      |      |
| RTD Tea            |                                 |      |      |      |      |      |
| Soft Drinks        |                                 |      |      |      |      |      |

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

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

| % off-trade                        | 2015                            | 2016 | 2017 | 2018 | 2019 | 2020 |
|------------------------------------|---------------------------------|------|------|------|------|------|
| Store-Based Retailing              | <b>Data removed from sample</b> |      |      |      |      |      |
| - Grocery Retailers                |                                 |      |      |      |      |      |
| -- Modern Grocery Retailers        |                                 |      |      |      |      |      |
| --- Convenience Stores             |                                 |      |      |      |      |      |
| --- Discounters                    |                                 |      |      |      |      |      |
| --- Forecourt Retailers            |                                 |      |      |      |      |      |
| --- Hypermarkets                   |                                 |      |      |      |      |      |
| --- Supermarkets                   |                                 |      |      |      |      |      |
| -- Traditional Grocery Retailers   |                                 |      |      |      |      |      |
| --- Food/drink/tobacco specialists |                                 |      |      |      |      |      |
| --- Independent Small Grocers      |                                 |      |      |      |      |      |
| --- Other Grocery Retailers        |                                 |      |      |      |      |      |
| - Mixed Retailers                  |                                 |      |      |      |      |      |
| - Non-Grocery Specialists          |                                 |      |      |      |      |      |
| Non-Store Retailing                |                                 |      |      |      |      |      |
| - Vending                          |                                 |      |      |      |      |      |
| - Homeshopping                     |                                 |      |      |      |      |      |

- E-Commerce
- Direct Selling
- Total

**Data removed from sample**

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

**Table 34** Distribution of Off-trade Soft Drinks (as sold) by Format and Category: % Volume 2020

% off-trade

|                                    | BW                              | CB  | CN  | JU | RTDC | RTDT |
|------------------------------------|---------------------------------|-----|-----|----|------|------|
| Store-Based Retailing              | <b>Data removed from sample</b> |     |     |    |      |      |
| - Grocery Retailers                |                                 |     |     |    |      |      |
| -- Modern Grocery Retailers        |                                 |     |     |    |      |      |
| --- Convenience Stores             |                                 |     |     |    |      |      |
| --- Discounters                    |                                 |     |     |    |      |      |
| --- Forecourt Retailers            |                                 |     |     |    |      |      |
| --- Hypermarkets                   |                                 |     |     |    |      |      |
| --- Supermarkets                   |                                 |     |     |    |      |      |
| -- Traditional Grocery Retailers   |                                 |     |     |    |      |      |
| --- Food/drink/tobacco specialists |                                 |     |     |    |      |      |
| --- Independent Small Grocers      |                                 |     |     |    |      |      |
| --- Other Grocery Retailers        |                                 |     |     |    |      |      |
| - Mixed Retailers                  |                                 |     |     |    |      |      |
| - Non-Grocery Specialists          |                                 |     |     |    |      |      |
| Non-Store Retailing                |                                 |     |     |    |      |      |
| - Vending                          |                                 |     |     |    |      |      |
| - Homeshopping                     |                                 |     |     |    |      |      |
| - E-Commerce                       |                                 |     |     |    |      |      |
| - Direct Selling                   |                                 |     |     |    |      |      |
| Total                              |                                 |     |     |    |      |      |
|                                    | ED                              | SPD | ASD |    |      |      |
| Store-Based Retailing              | <b>Data removed from sample</b> |     |     |    |      |      |
| - Grocery Retailers                |                                 |     |     |    |      |      |
| -- Modern Grocery Retailers        |                                 |     |     |    |      |      |
| --- Convenience Stores             |                                 |     |     |    |      |      |
| --- Discounters                    |                                 |     |     |    |      |      |
| --- Forecourt Retailers            |                                 |     |     |    |      |      |
| --- Hypermarkets                   |                                 |     |     |    |      |      |
| --- Supermarkets                   |                                 |     |     |    |      |      |
| -- Traditional Grocery Retailers   |                                 |     |     |    |      |      |
| --- Food/drink/tobacco specialists |                                 |     |     |    |      |      |
| --- Independent Small Grocers      |                                 |     |     |    |      |      |
| --- Other Grocery Retailers        |                                 |     |     |    |      |      |
| - Mixed Retailers                  |                                 |     |     |    |      |      |
| - Non-Grocery Specialists          |                                 |     |     |    |      |      |

Non-Store Retailing  
 - Vending  
 - Homeshopping  
 - E-Commerce  
 - Direct Selling  
 Total

**Data removed from sample**

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

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

million litres

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

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

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

% volume growth

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

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

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

EUR million

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

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

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

% constant value growth

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

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

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

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

% volume growth

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

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

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

EUR million

|               | 2020                            | 2021 | 2022 | 2023 | 2024 | 2025 |
|---------------|---------------------------------|------|------|------|------|------|
| Bottled Water | <b>Data removed from sample</b> |      |      |      |      |      |
| Carbonates    |                                 |      |      |      |      |      |
| Concentrates  |                                 |      |      |      |      |      |
| Juice         |                                 |      |      |      |      |      |
| RTD Coffee    |                                 |      |      |      |      |      |
| RTD Tea       |                                 |      |      |      |      |      |
| Energy Drinks |                                 |      |      |      |      |      |

Sports Drinks  
Asian Speciality Drinks  
Soft Drinks

**Data removed from sample**

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  
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 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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## SOURCES

Sources used during the research included the following:

Summary 1    Research Sources

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Source: Euromonitor International