

Coffee in Estonia

January 2024

Table of Contents

KEY DATA FINDINGS

2023 DEVELOPMENTS

Fresh coffee benefits from the rising demand for natural products
Instant coffee is perceived to offer low quality and an inferior taste
Paulig Coffee Estonia AS retains its lead in 2023

PROSPECTS AND OPPORTUNITIES

Convenience and ease of preparation to drive growth of fresh ground coffee pods
The development of the coffee culture will boost demand for fresh coffee beans
Coffee shops and tourism drive foodservice growth of fresh coffee

CATEGORY DATA

Table 1 - Retail Sales of Coffee by Category: Volume 2018-2023
Table 2 - Retail Sales of Coffee by Category: Value 2018-2023
Table 3 - Retail Sales of Coffee by Category: % Volume Growth 2018-2023
Table 4 - Retail Sales of Coffee by Category: % Value Growth 2018-2023
Table 5 - NBO Company Shares of Coffee: % Retail Value 2019-2023
Table 6 - LBN Brand Shares of Coffee: % Retail Value 2020-2023
Table 7 - Forecast Retail Sales of Coffee by Category: Volume 2023-2028
Table 8 - Forecast Retail Sales of Coffee by Category: Value 2023-2028
Table 9 - Forecast Retail Sales of Coffee by Category: % Volume Growth 2023-2028
Table 10 - Forecast Retail Sales of Coffee by Category: % Value Growth 2023-2028

Hot Drinks in Estonia - Industry Overview

EXECUTIVE SUMMARY

Hot drinks records further growth in 2023, with rising interest in natural and healthier beverages
Coffee culture development
Paulig Coffee Estonia AS maintains its lead with quality, affordable products
Discounters and e-commerce lead growth
Foodservice growth supported by a wider variety of hot drinks options
Further growth expected, with rising demand for natural products

MARKET DATA

Table 11 - Sales of Hot Drinks by Retail vs Foodservice: % Volume Breakdown 2018-2023
Table 12 - Sales of Hot Drinks by Retail vs Foodservice: % Volume Growth 2018-2023
Table 13 - Retail Sales of Hot Drinks by Category: Volume 2018-2023
Table 14 - Retail Sales of Hot Drinks by Category: Value 2018-2023
Table 15 - Retail Sales of Hot Drinks by Category: % Volume Growth 2018-2023
Table 16 - Retail Sales of Hot Drinks by Category: % Value Growth 2018-2023
Table 17 - Foodservice Sales of Hot Drinks by Category: Volume 2018-2023
Table 18 - Foodservice Sales of Hot Drinks by Category: % Volume Growth 2018-2023
Table 19 - Total Sales of Hot Drinks by Category: Total Volume 2018-2023
Table 20 - Total Sales of Hot Drinks by Category: % Total Volume Growth 2018-2023
Table 21 - NBO Company Shares of Hot Drinks: % Retail Value 2019-2023
Table 22 - LBN Brand Shares of Hot Drinks: % Retail Value 2020-2023
Table 23 - Penetration of Private Label in Hot Drinks by Category: % Retail Value 2018-2023
Table 24 - Retail Distribution of Hot Drinks by Format: % Volume 2018-2023
Table 25 - Retail Distribution of Hot Drinks by Format and Category: % Volume 2023
Table 26 - Forecast Sales of Hot Drinks by Retail vs Foodservice: % Volume Breakdown 2023-2028
Table 27 - Forecast Sales of Hot Drinks by Retail vs Foodservice: % Volume Growth 2023-2028

Table 28 - Forecast Retail Sales of Hot Drinks by Category: Volume 2023-2028

Table 29 - Forecast Retail Sales of Hot Drinks by Category: Value 2023-2028

Table 30 - Forecast Retail Sales of Hot Drinks by Category: % Volume Growth 2023-2028

Table 31 - Forecast Retail Sales of Hot Drinks by Category: % Value Growth 2023-2028

Table 32 - Forecast Foodservice Sales of Hot Drinks by Category: Volume 2023-2028

Table 33 - Forecast Foodservice Sales of Hot Drinks by Category: % Volume Growth 2023-2028

Table 34 - Forecast Total Sales of Hot Drinks by Category: Total Volume 2023-2028

Table 35 - Forecast Total Sales of Hot Drinks by Category: % Total Volume Growth 2023-2028

DISCLAIMER

SOURCES

Summary 1 - Research Sources

About Euromonitor International

Euromonitor International is an independent market intelligence provider. Data, insight and analysis stem from in-the-field research spanning 210 national markets.

Content ranges from the in-depth and country-specific, to key strategic themes with a global range and significance. Products cover a comprehensive range of insights and market data, but can be broadly categorised as:

- **Strategy Briefings:** Global or regional in scope, and focussing on the most important themes shaping consumer demand, the key markets, competitive environment and future outlook across a range of industries.
- **Company Profiles:** Analysis dedicated to the world's most significant companies, with detailed insight into their activities, focus of operations, their competitors, their geographic presence and performance.
- **Country Reports:** For an in-depth understanding of specific countries, whether by industry, economic metrics or consumer trends and lifestyles. These reports cover current trends, consumer demand, market potential and future prospects, with country-specific local insight and comprehensive data, unavailable elsewhere.

For more information on this report, further enquiries can be directed via this link www.euromonitor.com/coffee-in-estonia/report.