

# Hot Drinks in Estonia

January 2024

Table of Contents

## Hot Drinks in Estonia

### 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 1 - Sales of Hot Drinks by Retail vs Foodservice: % Volume Breakdown 2018-2023

Table 2 - Sales of Hot Drinks by Retail vs Foodservice: % Volume Growth 2018-2023

Table 3 - Retail Sales of Hot Drinks by Category: Volume 2018-2023

Table 4 - Retail Sales of Hot Drinks by Category: Value 2018-2023

Table 5 - Retail Sales of Hot Drinks by Category: % Volume Growth 2018-2023

Table 6 - Retail Sales of Hot Drinks by Category: % Value Growth 2018-2023

Table 7 - Foodservice Sales of Hot Drinks by Category: Volume 2018-2023

Table 8 - Foodservice Sales of Hot Drinks by Category: % Volume Growth 2018-2023

Table 9 - Total Sales of Hot Drinks by Category: Total Volume 2018-2023

Table 10 - Total Sales of Hot Drinks by Category: % Total Volume Growth 2018-2023

Table 11 - NBO Company Shares of Hot Drinks: % Retail Value 2019-2023

Table 12 - LBN Brand Shares of Hot Drinks: % Retail Value 2020-2023

Table 13 - Penetration of Private Label in Hot Drinks by Category: % Retail Value 2018-2023

Table 14 - Retail Distribution of Hot Drinks by Format: % Volume 2018-2023

Table 15 - Retail Distribution of Hot Drinks by Format and Category: % Volume 2023

Table 16 - Forecast Sales of Hot Drinks by Retail vs Foodservice: % Volume Breakdown 2023-2028

Table 17 - Forecast Sales of Hot Drinks by Retail vs Foodservice: % Volume Growth 2023-2028

Table 18 - Forecast Retail Sales of Hot Drinks by Category: Volume 2023-2028

Table 19 - Forecast Retail Sales of Hot Drinks by Category: Value 2023-2028

Table 20 - Forecast Retail Sales of Hot Drinks by Category: % Volume Growth 2023-2028

Table 21 - Forecast Retail Sales of Hot Drinks by Category: % Value Growth 2023-2028

Table 22 - Forecast Foodservice Sales of Hot Drinks by Category: Volume 2023-2028

Table 23 - Forecast Foodservice Sales of Hot Drinks by Category: % Volume Growth 2023-2028

Table 24 - Forecast Total Sales of Hot Drinks by Category: Total Volume 2023-2028

Table 25 - Forecast Total Sales of Hot Drinks by Category: % Total Volume Growth 2023-2028

### DISCLAIMER

### SOURCES

Summary 1 - Research Sources

## Coffee in Estonia

### 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 26 - Retail Sales of Coffee by Category: Volume 2018-2023

Table 27 - Retail Sales of Coffee by Category: Value 2018-2023

Table 28 - Retail Sales of Coffee by Category: % Volume Growth 2018-2023

Table 29 - Retail Sales of Coffee by Category: % Value Growth 2018-2023

Table 30 - NBO Company Shares of Coffee: % Retail Value 2019-2023

Table 31 - LBN Brand Shares of Coffee: % Retail Value 2020-2023

Table 32 - Forecast Retail Sales of Coffee by Category: Volume 2023-2028

Table 33 - Forecast Retail Sales of Coffee by Category: Value 2023-2028

Table 34 - Forecast Retail Sales of Coffee by Category: % Volume Growth 2023-2028

Table 35 - Forecast Retail Sales of Coffee by Category: % Value Growth 2023-2028

#### Tea in Estonia

#### KEY DATA FINDINGS

##### 2023 DEVELOPMENTS

Rising demand for premium and speciality black teas drives value sales in 2023

Focus on health and rising popularity of camping support growth of instant tea

Tanker Brewery OU leads with a wide portfolio of different tea types

#### PROSPECTS AND OPPORTUNITIES

Rising health consciousness to drive the growth of fruit/herbal tea

Loose black tea to benefit from environmental concern and demand for natural products

Green tea to remain popular, offering a number of health benefits

#### CATEGORY DATA

Table 36 - Retail Sales of Tea by Category: Volume 2018-2023

Table 37 - Retail Sales of Tea by Category: Value 2018-2023

Table 38 - Retail Sales of Tea by Category: % Volume Growth 2018-2023

Table 39 - Retail Sales of Tea by Category: % Value Growth 2018-2023

Table 40 - NBO Company Shares of Tea: % Retail Value 2019-2023

Table 41 - LBN Brand Shares of Tea: % Retail Value 2020-2023

Table 42 - Forecast Retail Sales of Tea by Category: Volume 2023-2028

Table 43 - Forecast Retail Sales of Tea by Category: Value 2023-2028

Table 44 - Forecast Retail Sales of Tea by Category: % Volume Growth 2023-2028

Table 45 - Forecast Retail Sales of Tea by Category: % Value Growth 2023-2028

#### Other Hot Drinks in Estonia

#### KEY DATA FINDINGS

##### 2023 DEVELOPMENTS

Health benefits of other plant-based hot drinks drive growth in 2023

Falling demand for sugar-laden chocolate-based powdered flavoured beverages

Nestlé SA leads with its well-known global Nesquik brand

#### PROSPECTS AND OPPORTUNITIES

Rising health trend and immaturity to support further growth of other plant-based hot drinks

Versatility and popularity in foodservice will ensure marginal growth of chocolate-based flavoured powder drinks

Rising sales of other hot beverages through e-commerce

#### CATEGORY DATA

Table 46 - Retail Sales of Other Hot Drinks by Category: Volume 2018-2023

Table 47 - Retail Sales of Other Hot Drinks by Category: Value 2018-2023

Table 48 - Retail Sales of Other Hot Drinks by Category: % Volume Growth 2018-2023

Table 49 - Retail Sales of Other Hot Drinks by Category: % Value Growth 2018-2023

Table 50 - NBO Company Shares of Other Hot Drinks: % Retail Value 2019-2023

Table 51 - LBN Brand Shares of Other Hot Drinks: % Retail Value 2020-2023

Table 52 - Forecast Retail Sales of Other Hot Drinks by Category: Volume 2023-2028

Table 53 - Forecast Retail Sales of Other Hot Drinks by Category: Value 2023-2028

Table 54 - Forecast Retail Sales of Other Hot Drinks by Category: % Volume Growth 2023-2028

Table 55 - Forecast Retail Sales of Other Hot Drinks by Category: % Value Growth 2023-2028

## 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/hot-drinks-in-estonia/report](http://www.euromonitor.com/hot-drinks-in-estonia/report).