



Spirits in Estonia

June 2024

Table of Contents

Spirits in Estonia - Category analysis

KEY DATA FINDINGS

2023 DEVELOPMENTS

Slowdown after recovery

Craft and labelling trends emphasise sophistication and more natural claims

Liviko leverages quality, a wide offer and strong distribution to lead spirits

PROSPECTS AND OPPORTUNITIES

Moderate stagnation

Growing popularity of rum and resurgence of Scotch

Social media focus to reach young adults

CATEGORY DATA

Table 1 - Sales of Spirits by Category: Total Volume 2018-2023

Table 2 - Sales of Spirits by Category: Total Value 2018-2023

Table 3 - Sales of Spirits by Category: % Total Volume Growth 2018-2023

Table 4 - Sales of Spirits by Category: % Total Value Growth 2018-2023

Table 5 - Sales of Spirits by Off-trade vs On-trade: Volume 2018-2023

Table 6 - Sales of Spirits by Off-trade vs On-trade: Value 2018-2023

Table 7 - Sales of Spirits by Off-trade vs On-trade: % Volume Growth 2018-2023

Table 8 - Sales of Spirits by Off-trade vs On-trade: % Value Growth 2018-2023

Table 9 - GBO Company Shares of Spirits: % Total Volume 2019-2023

Table 10 - NBO Company Shares of Spirits: % Total Volume 2019-2023

Table 11 - LBN Brand Shares of Spirits: % Total Volume 2019-2023

Table 12 - Forecast Sales of Spirits by Category: Total Volume 2023-2028

Table 13 - Forecast Sales of Spirits by Category: Total Value 2023-2028

Table 14 - Forecast Sales of Spirits by Category: % Total Volume Growth 2023-2028

Table 15 - Forecast Sales of Spirits by Category: % Total Value Growth 2023-2028

Alcoholic Drinks in Estonia - Industry Overview

EXECUTIVE SUMMARY

Alcoholic drinks in 2023: The big picture

2023 key trends

Competitive landscape

Retailing developments

On-trade vs off-trade split

What next for alcoholic drinks?

MARKET BACKGROUND

Legislation

Legal purchasing age and legal drinking age

Drink driving

Advertising

Smoking ban

Opening hours

On-trade establishments

TAXATION AND DUTY LEVIES

Summary 1 - Taxation and Duty Levies on Alcoholic Drinks 2023

OPERATING ENVIRONMENT

Contraband/parallel trade
Duty free
Cross-border/private imports

KEY NEW PRODUCT LAUNCHES

Outlook

MARKET INDICATORS

Table 16 - Retail Consumer Expenditure on Alcoholic Drinks 2018-2023

MARKET DATA

Table 17 - Sales of Alcoholic Drinks by Category: Total Volume 2018-2023

Table 18 - Sales of Alcoholic Drinks by Category: Total Value 2018-2023

Table 19 - Sales of Alcoholic Drinks by Category: % Total Volume Growth 2018-2023

Table 20 - Sales of Alcoholic Drinks by Category: % Total Value Growth 2018-2023

Table 21 - Sales of Alcoholic Drinks by Category by Off-trade vs On-trade: Volume 2023

Table 22 - Sales of Alcoholic Drinks by Category by Off-trade vs On-trade: Value 2023

Table 23 - Sales of Alcoholic Drinks by Category by Off-trade vs On-trade: % Volume 2023

Table 24 - Sales of Alcoholic Drinks by Category by Off-trade vs On-trade: % Value 2023

Table 25 - GBO Company Shares of Alcoholic Drinks: % Total Volume 2019-2023

Table 26 - Distribution of Alcoholic Drinks by Format: % Off-trade Value 2018-2023

Table 27 - Distribution of Alcoholic Drinks by Format and by Category: % Off-trade Volume 2023

Table 28 - Forecast Sales of Alcoholic Drinks by Category: Total Volume 2023-2028

Table 29 - Forecast Sales of Alcoholic Drinks by Category: Total Value 2023-2028

Table 30 - Forecast Sales of Alcoholic Drinks by Category: % Total Volume Growth 2023-2028

Table 31 - Forecast Sales of Alcoholic Drinks by Category: % Total Value Growth 2023-2028

DISCLAIMER

SOURCES

Summary 2 - 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/spirits-in-estonia/report.