



Euromonitor
International

RTD Tea in Estonia

December 2025

Table of Contents

RTD Tea in Estonia - Category analysis

KEY DATA FINDINGS

2025 DEVELOPMENTS

RTD tea faces ongoing pressures

INDUSTRY PERFORMANCE

Declining sales amid competition from more innovative RTD offerings

Reduced sugar offerings show greatest resilience

WHAT'S NEXT?

Continued decline for RTD tea

Private label could gain visibility

Forthcoming sugar tax could encourage reformulation

COMPETITIVE LANDSCAPE

Cola-Cola maintains leadership with Nestea

Private label expands from low base

CHANNELS

Supermarkets and hypermarkets lead sales

E-commerce continues to gain traction

CATEGORY DATA

Table 1 - Off-trade Sales of RTD Tea by Category: Volume 2020-2025

Table 2 - Off-trade Sales of RTD Tea by Category: Value 2020-2025

Table 3 - Off-trade Sales of RTD Tea by Category: % Volume Growth 2020-2025

Table 4 - Off-trade Sales of RTD Tea by Category: % Value Growth 2020-2025

Table 5 - NBO Company Shares of Off-trade RTD Tea: % Volume 2021-2025

Table 6 - LBN Brand Shares of Off-trade RTD Tea: % Volume 2022-2025

Table 7 - NBO Company Shares of Off-trade RTD Tea: % Value 2021-2025

Table 8 - LBN Brand Shares of Off-trade RTD Tea: % Value 2022-2025

Table 9 - Forecast Off-trade Sales of RTD Tea by Category: Volume 2025-2030

Table 10 - Forecast Off-trade Sales of RTD Tea by Category: Value 2025-2030

Table 11 - Forecast Off-trade Sales of RTD Tea by Category: % Volume Growth 2025-2030

Table 12 - Forecast Off-trade Sales of RTD Tea by Category: % Value Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

Soft Drinks in Estonia - Industry Overview

EXECUTIVE SUMMARY

Soft drink sales are impacted by weather, price rises, and changing consumer preferences

KEY DATA FINDINGS

INDUSTRY PERFORMANCE

Off-trade volumes decline amid cool summer and cautious consumer spending

Shift towards added-value and low-sugar beverages

Private label growth constrained by strong brand loyalty in key categories

WHAT'S NEXT?

Flat outlook as price sensitivity and category saturation limit growth

Value-added drinks will continue to gain ground among younger consumers

Weather conditions will continue to impact sales

COMPETITIVE LANDSCAPE

Coca-Cola lead sales, thanks to strong positions in carbonates and energy drinks

CHANNELS

Supermarkets and hypermarkets lead sales

Lidl drives growth of discounters

Foodservice vs retail split

MARKET DATA

Table 13 - Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: Volume 2020-2025

Table 14 - Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: % Volume Growth 2020-2025

Table 15 - Off-trade vs On-trade Sales of Soft Drinks by Channel: Value 2020-2025

Table 16 - Off-trade vs On-trade Sales of Soft Drinks by Channel: % Value Growth 2020-2025

Table 17 - Off-trade vs On-trade Sales of Soft Drinks (as sold) by Category: Volume 2025

Table 18 - Off-trade vs On-trade Sales of Soft Drinks (as sold) by Category: % Volume 2025

Table 19 - Off-trade vs On-trade Sales of Soft Drinks by Category: Value 2025

Table 20 - Off-trade vs On-trade Sales of Soft Drinks by Category: % Value 2025

Table 21 - Off-trade Sales of Soft Drinks (RTD) by Category: Volume 2020-2025

Table 22 - Off-trade Sales of Soft Drinks (RTD) by Category: % Volume Growth 2020-2025

Table 23 - Off-trade Sales of Soft Drinks by Category: Value 2020-2025

Table 24 - Off-trade Sales of Soft Drinks by Category: % Value Growth 2020-2025

Table 25 - Sales of Soft Drinks by Total Fountain On-trade: Volume 2020-2025

Table 26 - Sales of Soft Drinks by Total Fountain On-trade: % Volume Growth 2020-2025

Table 27 - NBO Company Shares of Off-trade Soft Drinks (RTD): % Volume 2021-2025

Table 28 - LBN Brand Shares of Off-trade Soft Drinks (RTD): % Volume 2022-2025

Table 29 - NBO Company Shares of Off-trade Soft Drinks: % Value 2021-2025

Table 30 - LBN Brand Shares of Off-trade Soft Drinks: % Value 2022-2025

Table 31 - Penetration of Private Label in Off-trade Soft Drinks (RTD) by Category: % Volume 2020-2025

Table 32 - Penetration of Private Label in Off-trade Soft Drinks by Category: % Value 2020-2025

Table 33 - Distribution of Off-trade Soft Drinks (as sold) by Format: % Volume 2020-2025

Table 34 - Distribution of Off-trade Soft Drinks (as sold) by Format and Category: % Volume 2025

Table 35 - Forecast Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: Volume 2025-2030

Table 36 - Forecast Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: % Volume Growth 2025-2030

Table 37 - Forecast Off-trade vs On-trade Sales of Soft Drinks by Channel: Value 2025-2030

Table 38 - Forecast Off-trade vs On-trade Sales of Soft Drinks by Channel: % Value Growth 2025-2030

Table 39 - Forecast Off-trade Sales of Soft Drinks (RTD) by Category: Volume 2025-2030

Table 40 - Forecast Off-trade Sales of Soft Drinks (RTD) by Category: % Volume Growth 2025-2030

Table 41 - Forecast Off-trade Sales of Soft Drinks by Category: Value 2025-2030

Table 42 - Forecast Off-trade Sales of Soft Drinks by Category: % Value Growth 2025-2030

Table 43 - Forecast Sales of Soft Drinks by Total Fountain On-trade: Volume 2025-2030

Table 44 - Forecast Sales of Soft Drinks by Total Fountain On-trade: % Volume Growth 2025-2030

COUNTRY REPORTS 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/rtd-tea-in-estonia/report.