



Tea in Estonia

December 2025

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Tea in Estonia - Category analysis

KEY DATA FINDINGS

2025 DEVELOPMENTS

Focus on niche, health-oriented consumption

INDUSTRY PERFORMANCE

Lack of tea drinking culture and unfavourable demographic trends limit sales

Black tea bags shows strongest performance

WHAT'S NEXT?

Modest projected growth, as core demographic base continues to decline

Premiumisation could represent key growth opportunity

Private label tea will continue to have limited impact

COMPETITIVE LANDSCAPE

Tanker retains its dominance through strength of Lipton brand

LTT's Senok sees fastest growth, while private label continues to make gains

CHANNELS

Supermarkets and hypermarkets dominate the retail landscape

Discounters drives growth

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Hot Drinks in Estonia - Industry Overview

EXECUTIVE SUMMARY

Inflation drives value growth amid declining demand

KEY DATA FINDINGS

INDUSTRY PERFORMANCE

Inflationary pressures drive value growth amid declining demand

Sharp increases in global coffee prices hinder consumption

Fruit/herbal tea remains significant

WHAT'S NEXT?

Hot drinks set to rebound amid economic recovery

Growing demand for indulgent coffee experiences

Tea and other hot drinks will remain niche categories

COMPETITIVE LANDSCAPE

Paulig leads hot drinks sales

Starbucks expands from low base

CHANNELS

Supermarkets and hypermarkets lead sales

Lidl drives growth of discounters

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