



**Euromonitor
International**

Coffee in Estonia

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Coffee in Estonia - Category analysis

KEY DATA FINDINGS

2025 DEVELOPMENTS

Premiumisation and convenience shape coffee consumption

INDUSTRY PERFORMANCE

Declining demand amid economic pressures

Fresh ground coffee pods benefit from enduring demand for indulgent experiences

WHAT'S NEXT?

Moderate value growth for coffee, driven by premiumisation

Product innovation to centre on flavours

Expected decline in instant coffee consumption

COMPETITIVE LANDSCAPE

Paulig continues to hold competitive edge, thanks to its strong heritage

Gurmans and Lidl benefit from growing consumer demand for premium and value-for-money offerings

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E-commerce sees strongest performance

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Hot Drinks in Estonia - Industry Overview

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Inflation drives value growth amid declining demand

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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

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Starbucks expands from low base

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About Euromonitor International

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