



Euromonitor  
International

# Beer in Estonia

July 2025

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KEY DATA FINDINGS

2024 DEVELOPMENTS

Total volume sales growth subdued by rapid decline in on-trade consumption  
A Le Coq AS maintains overall lead in beer  
Supermarkets and hypermarkets continue to dominate off-trade distribution

PROSPECTS AND OPPORTUNITIES

Off- and on-trade beer consumption projected to increase steadily  
Flavoured and non/low alcohol products will be focal points for innovation  
Sustainability concerns will continue to shape packaging strategies

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On-trade vs off-trade split  
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Legislation  
Legal purchasing age and legal drinking age  
Drink driving  
Advertising  
Smoking ban  
Opening hours  
On-trade establishments

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