

Cooking Ingredients and Meals in Estonia

October 2024

Table of Contents

Cooking Ingredients and Meals in Estonia

EXECUTIVE SUMMARY

Cooking ingredients and meals in 2024: The big picture

Key trends in 2024

Competitive landscape

Channel developments

What next for cooking ingredients and meals?

MARKET DATA

- Table 1 Sales of Cooking Ingredients and Meals by Category: Volume 2019-2024
- Table 2 Sales of Cooking Ingredients and Meals by Category: Value 2019-2024
- Table 3 Sales of Cooking Ingredients and Meals by Category: % Volume Growth 2019-2024
- Table 4 Sales of Cooking Ingredients and Meals by Category: % Value Growth 2019-2024
- Table 5 NBO Company Shares of Cooking Ingredients and Meals: % Value 2020-2024
- Table 6 LBN Brand Shares of Cooking Ingredients and Meals: % Value 2021-2024
- Table 7 Penetration of Private Label by Category: % Value 2019-2024
- Table 8 Distribution of Cooking Ingredients and Meals by Format: % Value 2019-2024
- Table 9 Forecast Sales of Cooking Ingredients and Meals by Category: Volume 2024-2029
- Table 10 Forecast Sales of Cooking Ingredients and Meals by Category: Value 2024-2029
- Table 11 Forecast Sales of Cooking Ingredients and Meals by Category: % Volume Growth 2024-2029
- Table 12 Forecast Sales of Cooking Ingredients and Meals by Category: % Value Growth 2024-2029

DISCLAIMER

SOURCES

Summary 1 - Research Sources

Edible Oils in Estonia

KEY DATA FINDINGS

2024 DEVELOPMENTS

Fall in volume sales

Scanola maintains its lead

Price key driver of value sales

PROSPECTS AND OPPORTUNITIES

Continuing volume decline over forecast period

Private label gains further value share

Higher levels of segmentation over forecast period

CATEGORY DATA

- Table 13 Sales of Edible Oils by Category: Volume 2019-2024
- Table 14 Sales of Edible Oils by Category: Value 2019-2024
- Table 15 Sales of Edible Oils by Category: % Volume Growth 2019-2024
- Table 16 Sales of Edible Oils by Category: % Value Growth 2019-2024
- Table 17 NBO Company Shares of Edible Oils: % Value 2020-2024
- Table 18 LBN Brand Shares of Edible Oils: % Value 2021-2024
- Table 19 Distribution of Edible Oils by Format: % Value 2019-2024
- Table 20 Forecast Sales of Edible Oils by Category: Volume 2024-2029
- Table 21 Forecast Sales of Edible Oils by Category: Value 2024-2029
- Table 22 Forecast Sales of Edible Oils by Category: % Volume Growth 2024-2029
- Table 23 Forecast Sales of Edible Oils by Category: % Value Growth 2024-2029

Meals and Soups in Estonia

KEY DATA FINDINGS

2024 DEVELOPMENTS

Moderate performance in 2024, with volume sales only increasing slightly

Soup registers a recovery

Saarioinen and Salvest maintain their lead in 2024

PROSPECTS AND OPPORTUNITIES

Volume sales unchanged over forecast period

Hectic lifestyles support long term growth of ready meals

Increasing scrutiny of ingredients

CATEGORY DATA

Table 24 - Sales of Meals and Soups by Category: Volume 2019-2024

Table 25 - Sales of Meals and Soups by Category: Value 2019-2024

Table 26 - Sales of Meals and Soups by Category: % Volume Growth 2019-2024

Table 27 - Sales of Meals and Soups by Category: % Value Growth 2019-2024

Table 28 - NBO Company Shares of Meals and Soups: % Value 2020-2024

Table 29 - LBN Brand Shares of Meals and Soups: % Value 2021-2024

Table 30 - Distribution of Meals and Soups by Format: % Value 2019-2024

Table 31 - Forecast Sales of Meals and Soups by Category: Volume 2024-2029

Table 32 - Forecast Sales of Meals and Soups by Category: Value 2024-2029

Table 33 - Forecast Sales of Meals and Soups by Category: % Volume Growth 2024-2029

Table 34 - Forecast Sales of Meals and Soups by Category: % Value Growth 2024-2029

Sauces, Dips and Condiments in Estonia

KEY DATA FINDINGS

2024 DEVELOPMENTS

Overall volume sales unchanged in 2024

Soy sauce registers highest volume growth

Põltsamaa Felix continues to lead

PROSPECTS AND OPPORTUNITIES

Rising popularity of Asian cuisine to benefit soy and fish sauces

Weak performance for mayonnaise

Clean ingredients increasingly important

CATEGORY DATA

Table 35 - Sales of Sauces, Dips and Condiments by Category: Volume 2019-2024

Table 36 - Sales of Sauces, Dips and Condiments by Category: Value 2019-2024

Table 37 - Sales of Sauces, Dips and Condiments by Category: % Volume Growth 2019-2024

Table 38 - Sales of Sauces, Dips and Condiments by Category: % Value Growth 2019-2024

Table 39 - Sales of Liquid Recipe Sauces by Type: % Value 2019-2024

Table 40 - NBO Company Shares of Sauces, Dips and Condiments: % Value 2020-2024

Table 41 - LBN Brand Shares of Sauces, Dips and Condiments: % Value 2021-2024

Table 42 - Distribution of Sauces, Dips and Condiments by Format: % Value 2019-2024

Table 43 - Forecast Sales of Sauces, Dips and Condiments by Category: Volume 2024-2029

Table 44 - Forecast Sales of Sauces, Dips and Condiments by Category: Value 2024-2029

Table 45 - Forecast Sales of Sauces, Dips and Condiments by Category: % Volume Growth 2024-2029

Table 46 - Forecast Sales of Sauces, Dips and Condiments by Category: % Value Growth 2024-2029

Sweet Spreads in Estonia

KEY DATA FINDINGS

2024 DEVELOPMENTS

Stable performance in 2024

Peanut butter popular with sports enthusiasts

Salvest maintains its clear lead in 2024, but gains for private label

PROSPECTS AND OPPORTUNITIES

Honey continues to lead

Volume decline for chocolate spreads

Higher prices of healthier options continue to be an obstacle

CATEGORY DATA

Table 47 - Sales of Sweet Spreads by Category: Volume 2019-2024

Table 48 - Sales of Sweet Spreads by Category: Value 2019-2024

Table 49 - Sales of Sweet Spreads by Category: % Volume Growth 2019-2024

Table 50 - Sales of Sweet Spreads by Category: % Value Growth 2019-2024

Table 51 - NBO Company Shares of Sweet Spreads: % Value 2020-2024

Table 52 - LBN Brand Shares of Sweet Spreads: % Value 2021-2024

Table 53 - Distribution of Sweet Spreads by Format: % Value 2019-2024

Table 54 - Forecast Sales of Sweet Spreads by Category: Volume 2024-2029

Table 55 - Forecast Sales of Sweet Spreads by Category: Value 2024-2029

Table 56 - Forecast Sales of Sweet Spreads by Category: % Volume Growth 2024-2029

Table 57 - Forecast Sales of Sweet Spreads by Category: % Value Growth 2024-2029

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/cooking-ingredients-and-meals-in-estonia/report.