# Staple Foods in Estonia

November 2025

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## Staple Foods in Estonia



## Baked Goods in Estonia

### WHAT'S NEXT

Slight volume decline over forecast period

Growing focus on offerings with a healthier positioning

Packaged flat bread fares best

### COMPETITIVE LANDSCAPE

Pagar holds on to commanding lead

Dessert mix brand Balti Veski gains most value share

### CHANNELS

Supermarkets and hypermarkets largest channels

Discounters gain most value share

### CATEGORY DATA



### COUNTRY REPORTS DISCLAIMER

## Breakfast Cereals in Estonia

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### 2025 DEVELOPMENTS

Lidl continues to make gains

### INDUSTRY PERFORMANCE

Volume sales flat

Flakes register highest volume growth

### WHAT'S NEXT

Slight increase in volume sales over forecast period

Focos on healthier offerings

Increasing polarisation, with affordability and value-added benefits both driving sales

### COMPETITIVE LANDSCAPE

Local players have significant foothold

Tartu Mill gains most value sales

### CHANNELS

Supermarkets and hypermarkets largest channels

Discounters gain most value share

### CATEGORY DATA

KEY DATA FINDINGS

2025 DEVELOPMENTS

Processed meat still very popular, though volume sales fall

INDUSTRY PERFORMANCE

Fall in constant value and volume sales

Chilled processed seafood gains most value share

WHAT'S NEXT

Moderate outlook over forecast period

More focus on highlighting health benefits

Affordability remains key

COMPETITIVE LANDSCAPE

HKScan holds on to commanding lead

Local processed seafood player, Läätsa Kalatööstus, gains most value share

CHANNELS

Supermarkets and hypermarkets dominate

Discounters gain most value share

CATEGORY DATA



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## Rice, Pasta and Noodles in Estonia

KEY DATA FINDINGS

2025 DEVELOPMENTS

Pasta accounts for most value sales

INDUSTRY PERFORMANCE

Profit margins tight in 2025

Dried pasta gains most value share

WHAT'S NEXT

Volume sales largely flat

Health to become key driver of growth

Larger range of rice available over forecast period

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Instant noodle brand leads

Pasta company La Molisana gains significant value share

CHANNELS

Supermarkets and hypermarkets dominate

Discounters gain most value share

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