



Euromonitor
International

Ice Cream in Estonia

July 2025

Table of Contents

KEY DATA FINDINGS

2025 DEVELOPMENTS

Demand in ice cream holds up better than in the other main snacks categories

Premia Tallinna Külmoone AS still the clear leader

Supermarkets still the main distribution channel for ice cream

PROSPECTS AND OPPORTUNITIES

Efforts to reduce seasonality should help to maintain robust demand

Dairy ice cream will remain the dominant type in Estonia

More players likely to launch reduced sugar and reduced fat products

CATEGORY DATA

Table 1 - Sales of Ice Cream by Category: Volume 2020-2025

Table 2 - Sales of Ice Cream by Category: Value 2020-2025

Table 3 - Sales of Ice Cream by Category: % Volume Growth 2020-2025

Table 4 - Sales of Ice Cream by Category: % Value Growth 2020-2025

Table 5 - Sales of Ice Cream by Leading Flavours: Rankings 2020-2025

Table 6 - Sales of Impulse Ice Cream by Format: % Value 2020-2025

Table 7 - NBO Company Shares of Ice Cream: % Value 2021-2025

Table 8 - LBN Brand Shares of Ice Cream: % Value 2022-2025

Table 9 - NBO Company Shares of Impulse Ice Cream: % Value 2021-2025

Table 10 - LBN Brand Shares of Impulse Ice Cream: % Value 2022-2025

Table 11 - NBO Company Shares of Take-home Ice Cream: % Value 2021-2025

Table 12 - LBN Brand Shares of Take-home Ice Cream: % Value 2022-2025

Table 13 - Distribution of Ice Cream by Format: % Value 2020-2025

Table 14 - Forecast Sales of Ice Cream by Category: Volume 2025-2030

Table 15 - Forecast Sales of Ice Cream by Category: Value 2025-2030

Table 16 - Forecast Sales of Ice Cream by Category: % Volume Growth 2025-2030

Table 17 - Forecast Sales of Ice Cream by Category: % Value Growth 2025-2030

Snacks in Estonia - Industry Overview

EXECUTIVE SUMMARY

Snacks in 2025: The big picture

Key trends in 2025

Competitive Landscape

Channel developments

What next for snacks?

MARKET DATA

Table 18 - Sales of Snacks by Category: Volume 2020-2025

Table 19 - Sales of Snacks by Category: Value 2020-2025

Table 20 - Sales of Snacks by Category: % Volume Growth 2020-2025

Table 21 - Sales of Snacks by Category: % Value Growth 2020-2025

Table 22 - NBO Company Shares of Snacks: % Value 2021-2025

Table 23 - LBN Brand Shares of Snacks: % Value 2022-2025

Table 24 - Penetration of Private Label by Category: % Value 2020-2025

Table 25 - Distribution of Snacks by Format: % Value 2020-2025

Table 26 - Forecast Sales of Snacks by Category: Volume 2025-2030

Table 27 - Forecast Sales of Snacks by Category: Value 2025-2030

Table 28 - Forecast Sales of Snacks by Category: % Volume Growth 2025-2030

DISCLAIMER

SOURCES

Summary 1 - Research Sources

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/ice-cream-in-estonia/report.