



Meals and Soups in Estonia

November 2025

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Meals and Soups in Estonia - Category analysis

KEY DATA FINDINGS

2025 DEVELOPMENTS

Cautious consumer spending hinders growth

INDUSTRY PERFORMANCE

Modest growth as consumers balance cost with convenience

Shelf stable soup shows dynamism

WHAT'S NEXT?

New launches could inject life into sluggish category

Greater focus on quality and authenticity

COMPETITIVE LANDSCAPE

Saarioinen Eesti OÜ continues as leading player

Lidl continues to gain traction

CHANNELS

Supermarkets and hypermarkets lead distribution of meals and soups

Discounters is key driver of growth

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Cooking Ingredients and Meals in Estonia - Industry Overview

EXECUTIVE SUMMARY

Steady demand despite growing price pressures

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INDUSTRY PERFORMANCE

Stagnant performance as prices continue to rise

Health and wellness trend has growing influence of purchasing decisions

Strong preference for local and traditional products

WHAT'S NEXT?

Cooking ingredients and meals will face ongoing challenges

Positive forecast for olive oil while sauces will suffer from stagnation

Private label will continue to gain traction

COMPETITIVE LANDSCAPE

Salvest is leading local player

Armesta UAB sees rapid expansion

Private label ranges pose growing competition to branded offerings

CHANNELS

Supermarkets and hypermarkets remain dominant channels

Discounters leads channel growth

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