



Euromonitor
International

Sauces, Dips and Condiments in Estonia

November 2025

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Sauces, Dips and Condiments in Estonia - Category analysis

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2025 DEVELOPMENTS

Poor summer weather hinders demand for ketchup and barbecue sauces

INDUSTRY PERFORMANCE

Sluggish performance driven by economic uncertainty and unusually cool summer

Pickled products drive growth

WHAT'S NEXT?

Modest value growth amid volume stagnation

Health and wellness will have growing impact on purchasing decisions

COMPETITIVE LANDSCAPE

Põltsamaa Felix remains market leader, thanks to strong brand heritage

Industria Agricola Carredana sees rapid growth, driven by Panzani pasta sauces

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Supermarkets and hypermarkets serve as primary channels

Discounters and e-commerce continue to gain traction

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Cooking Ingredients and Meals in Estonia - Industry Overview

EXECUTIVE SUMMARY

Steady demand despite growing price pressures

KEY DATA FINDINGS

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

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