



**Euromonitor
International**

Breakfast Cereals in Estonia

November 2025

Table of Contents

Breakfast Cereals in Estonia - Category analysis

KEY DATA FINDINGS

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

Table 1 - Sales of Breakfast Cereals by Category: Volume 2020-2025

Table 2 - Sales of Breakfast Cereals by Category: Value 2020-2025

Table 3 - Sales of Breakfast Cereals by Category: % Volume Growth 2020-2025

Table 4 - Sales of Breakfast Cereals by Category: % Value Growth 2020-2025

Table 5 - NBO Company Shares of Breakfast Cereals: % Value 2021-2025

Table 6 - LBN Brand Shares of Breakfast Cereals: % Value 2022-2025

Table 7 - Distribution of Breakfast Cereals by Format: % Value 2020-2025

Table 8 - Forecast Sales of Breakfast Cereals by Category: Volume 2025-2030

Table 9 - Forecast Sales of Breakfast Cereals by Category: Value 2025-2030

Table 10 - Forecast Sales of Breakfast Cereals by Category: % Volume Growth 2025-2030

Table 11 - Forecast Sales of Breakfast Cereals by Category: % Value Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

Staple Foods in Estonia - Industry Overview

EXECUTIVE SUMMARY

Muted growth in 2025

KEY DATA FINDINGS

INDUSTRY PERFORMANCE

Slight recovery in 2025

Processed meat sees volume sales fall, while frozen processed fruit and vegetables fare better

Rising health consciousness influencing product development

WHAT'S NEXT?

Modest outlook over forecast period

Innovation key for branded players to stay ahead

Growing demand for healthier options

COMPETITIVE LANDSCAPE

Finnish meat processor HKScan continues to lead

Premium pasta brand La Molisana gains significant value share

CHANNELS

Supermarkets and hypermarkets dominate

E-commerce gains most value share

MARKET DATA

Table 12 - Sales of Staple Foods by Category: Volume 2020-2025

Table 13 - Sales of Staple Foods by Category: Value 2020-2025

Table 14 - Sales of Staple Foods by Category: % Volume Growth 2020-2025

Table 15 - Sales of Staple Foods by Category: % Value Growth 2020-2025

Table 16 - NBO Company Shares of Staple Foods: % Value 2021-2025

Table 17 - LBN Brand Shares of Staple Foods: % Value 2022-2025

Table 18 - Penetration of Private Label by Category: % Value 2021-2025

Table 19 - Distribution of Staple Foods by Format: % Value 2020-2025

Table 20 - Forecast Sales of Staple Foods by Category: Volume 2025-2030

Table 21 - Forecast Sales of Staple Foods by Category: Value 2025-2030

Table 22 - Forecast Sales of Staple Foods by Category: % Volume Growth 2025-2030

Table 23 - Forecast Sales of Staple Foods by Category: % Value Growth 2025-2030

COUNTRY REPORTS 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/breakfast-cereals-in-estonia/report.