



# 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

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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

### 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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Armesta UAB sees rapid expansion

Private label ranges pose growing competition to branded offerings

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