



Euromonitor
International

Yoghurt and Sour Milk Products in Estonia

October 2026

Table of Contents

Yoghurt and Sour Milk Products in Estonia - Category analysis

KEY DATA INSIGHTS

2026 DEVELOPMENTS

Yoghurt and Sour Milk Products Summary

INDUSTRY PERFORMANCE

Growth Slows as Price Pressures Continue to Shape Consumer Choices

Greek-Style Yoghurt and Protein Claims Drive Value

Chart 1 - Greek Yoghurt and Protein Claims Turn Yoghurt into the Growth Engine of Estonian Dairy

Private Label and Brands Compete on Functionality Even as Price Sensitivity Persists

Chart 2 - Value Sales 2021-2031

Chart 3 - Value Sales by Category 2026

WHAT'S NEXT?

Growth Set to Continue, with a Continued Move Towards Functional Yoghurt

Yoghurt Will Dominate and Drive Growth, but Also Opportunities within Sour Milk Products

Chart 4 - Forecast Value Sales 2021-2031

Chart 5 - Forecast Value Sales by Category 2026-2031

COMPETITIVE LANDSCAPE

Valio Adapts as Private Label Reshapes Competitive Dynamics

Differentiation Will Be Important for Brands and Private Label to Succeed

Chart 6 - Company Shares 2026

Chart 7 - Brand Shares 2026

CHANNELS

Discounters Gains Ground as Supermarkets Defends Sales through Promotions

Retail E-Commerce Gains, but Online Sales Stay Low Compared with Offline Sales

Chart 8 - Retail Channels 2021-2026

ECONOMIC CONTEXT

Chart 9 - Economic Context for Yoghurt and Sour Milk Products

Chart 10 - Real Gdp Growth 2021-2031

Chart 11 - Inflation 2021-2031

CONSUMER CONTEXT

Chart 12 - Consumer Context for Yoghurt and Sour Milk Products

Chart 13 - Population 2021-2031

Chart 14 - Population by Generation 2026

Chart 15 - Consumer Expenditure 2021-2031

COUNTRY REPORTS DISCLAIMER

Dairy Products and Alternatives in Estonia - Industry Overview

EXECUTIVE SUMMARY

2026 Developments

KEY DATA INSIGHTS

INDUSTRY PERFORMANCE

A Switch to Private Label, Products, Particularly at Discounters

Protein Claims Fuel Value Gains for Traditional Brands

Chart 16 - Protein Claims Drive the Only Real Demand Growth in Dairy
E-Piim'S Financial Collapse Reshapes Cheese and Powder Milk Supply
Chart 17 - Value Sales 2021-2031
Chart 18 - Value Sales by Category 2026

WHAT'S NEXT?

Dairy Set to Maintain Dominance, but Plant-Based Dairy on the Rise From a Low Base
Valio and Farni Likely to Shift Towards Protein Snacking to Protect Margins
Chart 19 - Forecast Value Sales 2021-2031
Chart 20 - Forecast Value Sales by Category 2026-2031

COMPETITIVE LANDSCAPE

Tere and Valio Defend Share as Private Label Climbs
Opportunities through Innovation and Private Label
Chart 21 - Company Shares 2026
Chart 22 - Brand Shares 2026

CHANNELS

Selver, Maxima and Rimi Anchor Value with Aggressive Promotions
Retail E-Commerce Share Remains Low as Consumers Favour In-Store Shopping
Chart 23 - Retail Channels 2021-2026

ECONOMIC CONTEXT

Chart 24 - Economic Context for Dairy Products and Alternatives
Chart 25 - Real Gdp Growth 2021-2031
Chart 26 - Inflation 2021-2031

CONSUMER CONTEXT

Chart 27 - Consumer Context for Dairy Products and Alternatives
Chart 28 - Population 2021-2031
Chart 29 - Population by Generation 2026
Chart 30 - Consumer Expenditure 2021-2031

COUNTRY REPORTS DISCLAIMER

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/yoghurt-and-sour-milk-products-in-estonia/report.

