



Sweet Spreads in Estonia

November 2025

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Sweet Spreads in Estonia - Category analysis

KEY DATA FINDINGS

2025 DEVELOPMENTS

Chocolate spreads volume sales hit by rising prices and health concerns

INDUSTRY PERFORMANCE

Waning demand for chocolate spreads

Jams and preserves show rising volumes

WHATS NEXT?

Modest predicted growth amid ongoing challenges

Nut and seed based spreads and natural ingredients could gain traction

COMPETITIVE LANDSCAPE

Salvest retains leadership with Meie Mari jams and preserves

Svensky Kaubanduse gains ground with affordable Nussa brand

CHANNELS

Hypermarkets dominate sales

Discounters leads growth

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Cooking Ingredients and Meals in Estonia - Industry Overview

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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

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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