



Sauces, Dips and Condiments in Estonia

November 2025

Table of Contents

Sauces, Dips and Condiments in Estonia - Category analysis

KEY DATA FINDINGS

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

CHANNELS

Supermarkets and hypermarkets serve as primary channels

Discounters and e-commerce continue to gain traction

CATEGORY DATA

Table 1 - Sales of Sauces, Dips and Condiments by Category: Volume 2020-2025

Table 2 - Sales of Sauces, Dips and Condiments by Category: Value 2020-2025

Table 3 - Sales of Sauces, Dips and Condiments by Category: % Volume Growth 2020-2025

Table 4 - Sales of Sauces, Dips and Condiments by Category: % Value Growth 2020-2025

Table 5 - Sales of Liquid Recipe Sauces by Type: % Value 2020-2025

Table 6 - NBO Company Shares of Sauces, Dips and Condiments: % Value 2021-2025

Table 7 - LBN Brand Shares of Sauces, Dips and Condiments: % Value 2022-2025

Table 8 - Distribution of Sauces, Dips and Condiments by Format: % Value 2020-2025

Table 9 - Forecast Sales of Sauces, Dips and Condiments by Category: Volume 2025-2030

Table 10 - Forecast Sales of Sauces, Dips and Condiments by Category: Value 2025-2030

Table 11 - Forecast Sales of Sauces, Dips and Condiments by Category: % Volume Growth 2025-2030

Table 12 - Forecast Sales of Sauces, Dips and Condiments by Category: % Value Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

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

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

MARKET DATA

Table 13 - Sales of Cooking Ingredients and Meals by Category: Volume 2020-2025

Table 14 - Sales of Cooking Ingredients and Meals by Category: Value 2020-2025

Table 15 - Sales of Cooking Ingredients and Meals by Category: % Volume Growth 2020-2025

Table 16 - Sales of Cooking Ingredients and Meals by Category: % Value Growth 2020-2025

Table 17 - NBO Company Shares of Cooking Ingredients and Meals: % Value 2021-2025

Table 18 - LBN Brand Shares of Cooking Ingredients and Meals: % Value 2022-2025

Table 19 - Penetration of Private Label by Category: % Value 2020-2025

Table 20 - Distribution of Cooking Ingredients and Meals by Format: % Value 2020-2025

Table 21 - Forecast Sales of Cooking Ingredients and Meals by Category: Volume 2025-2030

Table 22 - Forecast Sales of Cooking Ingredients and Meals by Category: Value 2025-2030

Table 23 - Forecast Sales of Cooking Ingredients and Meals by Category: % Volume Growth 2025-2030

Table 24 - Forecast Sales of Cooking Ingredients and Meals 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/sauces-dips-and-condiments-in-estonia/report.