

Rice, Pasta and Noodles in Estonia

November 2025

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Rice, Pasta and Noodles in Estonia - Category analysis

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2025 DEVELOPMENTS

Pasta accounts for most value sales

INDUSTRY PERFORMANCE

Profit margins tight in 2025

Dried pasta gains most value share

WHAT'S NEXT

Volume sales largely flat

Health to become key driver of growth

Larger range of rice available over forecast period

COMPETITIVE LANDSCAPE

Instant noodle brand leads

Pasta company La Molisana gains significant value share

CHANNELS

Supermarkets and hypermarkets dominate

Discounters gain most value share

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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

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CHANNELS

Supermarkets and hypermarkets dominate

E-commerce gains most value share

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