

Cooking Ingredients and Meals in Latvia

November 2025

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EXECUTIVE SUMMARY

Greater stability as price fluctuations ease

KEY DATA FINDINGS

INDUSTRY PERFORMANCE

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WHAT'S NEXT?

Stagnating sales of a mature market

Private label growth

Better future for barbecue-related products

COMPETITIVE LANDSCAPE

Orkla Food Latvija leads with its flagship Spilva brand Medsol Srl's dynamic growth supported by rising olive oil demand

CHANNELS

Convenience stores and supermarkets lead

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E-commerce's development constrained by a lack of investment

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Olive oil benefits from greater affordability and healthy appeal

INDUSTRY PERFORMANCE

Declining prices support growth of niche olive oil in 2025

Vegetable oils continue to dominate

WHAT'S NEXT?

Stagnation due to market's established nature Olive oil perceived as a healthier choice

COMPETITIVE LANDSCAPE

Associated Oil Packers' lead supported by strong demand from price-sensitive consumers Dynamic Medsol Srl appeals to a broad consumer base

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Supermarkets lead, offering convenience and private label Discounters' growth driven by the ongoing expansion of Lidl

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INDUSTRY PERFORMANCE

Demand impacted by economic uncertainty and home cooking Shelf stable soup appeals to a broad consumer base

WHAT'S NEXT?

Ongoing economic uncertainty will continue to limit demand Health and wellness concerns further constrain category expansion

COMPETITIVE LANDSCAPE

Nestlé leads with its flagship Maggi brand

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2025 DEVELOPMENTS

Private label gains share thanks to retailers' price competition

INDUSTRY PERFORMANCE

Unusually cold summer impacts sales of barbecue-related products

Recipe sauces maintain their growth momentum

WHAT'S NEXT?

Limited growth of a mature market

Health and wellness trend not expected to gain traction

Private label to gain momentum

COMPETITIVE LANDSCAPE

Leading Orkla Foods maintains a strong position in categories that are central to Latvian cuisine

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E-commerce has yet to gain significant ground

Lidl's expansion drives growth of discounters

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INDUSTRY PERFORMANCE

Growth remains moderate in 2025

Global cocoa prices drive value growth of chocolate spreads

Peanut butter remains niche

WHAT'S NEXT?

Further private label expansion as consumers demand value and quality

Challenge of health and wellness concerns

Possible introduction of sugar tax on food products

COMPETITIVE LANDSCAPE

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