



Processed Meat, Seafood and Alternatives To Meat in Estonia

November 2025

KEY DATA FINDINGS

2025 DEVELOPMENTS

Processed meat still very popular, though volume sales fall

INDUSTRY PERFORMANCE

Fall in constant value and volume sales

Chilled processed seafood gains most value share

WHAT'S NEXT

Moderate outlook over forecast period

More focus on highlighting health benefits

Affordability remains key

COMPETITIVE LANDSCAPE

HKScan holds on to commanding lead

Local processed seafood player, Läätsa Kalatööstus, gains most value share

CHANNELS

Supermarkets and hypermarkets dominate

Discounters gain most value share

CATEGORY DATA

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Staple Foods in Estonia - Industry Overview

EXECUTIVE SUMMARY

Muted growth in 2025

KEY DATA FINDINGS

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

Finnish meat processor HKScan continues to lead
Premium pasta brand La Molisana gains significant value share

CHANNELS

Supermarkets and hypermarkets dominate
E-commerce gains most value share

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