



Passport

Sweet Spreads in Estonia

Euromonitor International

December 2021

This sample report is for illustration
purposes only.

Some content and data have been
changed.

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SWEET SPREADS IN ESTONIA - CATEGORY ANALYSIS

KEY DATA FINDINGS

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2021 DEVELOPMENTS

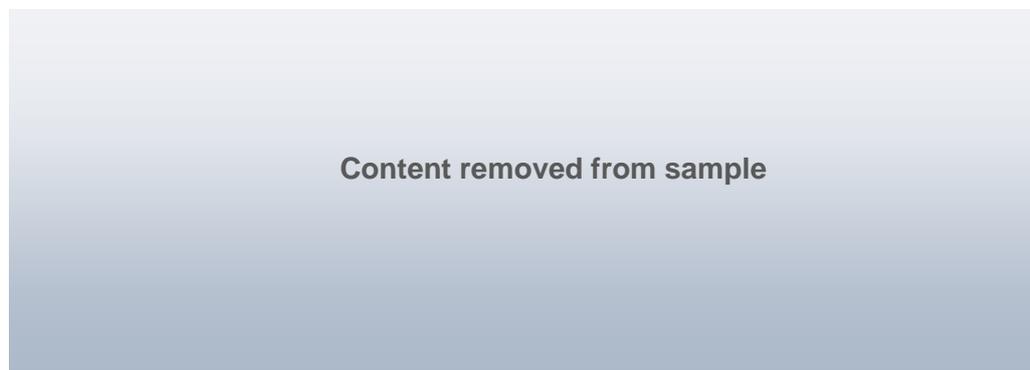
Honey gets boost from spotlight on immunity during COVID-19 pandemic, whilst nut and seed based spreads is supported by growing number of vegetarians

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Meie Mari faces growing pressure from Põltsamaa's growing range in jams and preserves

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Competitive landscape of honey to remain fragmented with small players playing an important role in the category

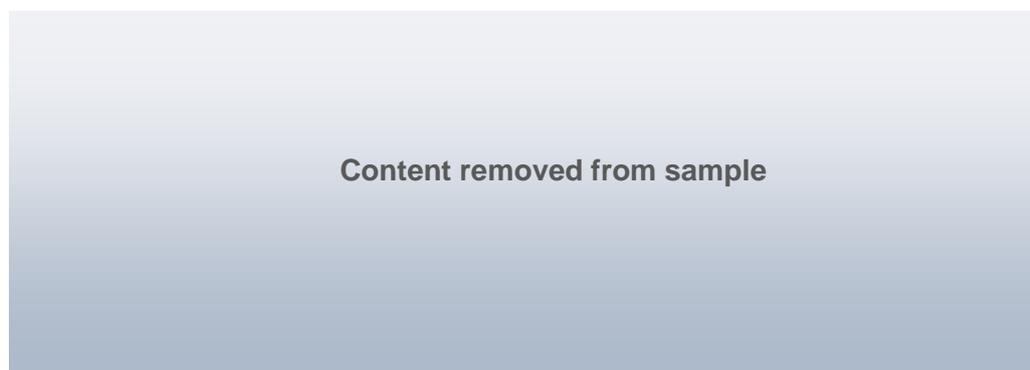


PROSPECTS AND OPPORTUNITIES

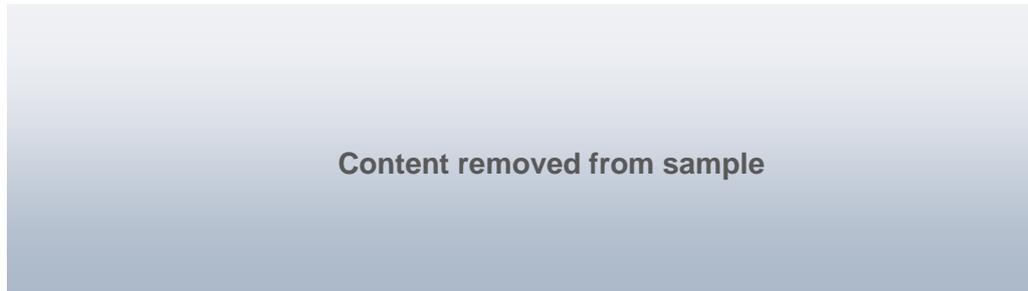
Honey continues to lead sales thanks to traditional positioning as nut and seed based spreads looks set to develop



Jams and preserves to lose momentum as Estonians move away from sugary products



Private label looks set to gain in value share, following the expansion of the discounters channel



CATEGORY DATA

Table 1 Sales of Sweet Spreads by Category: Volume 2016-2021

'000 tonnes	2016	2017	2018	2019	2020	2021
Sweet Spreads	Data removed from sample					
Jams and Preserves						
Honey						
Chocolate Spreads						
Nut and Seed Based Spreads						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 2 Sales of Sweet Spreads by Category: Value 2016-2021

EUR million	2016	2017	2018	2019	2020	2021
Sweet Spreads	Data removed from sample					
Jams and Preserves						
Honey						
Chocolate Spreads						
Nut and Seed Based Spreads						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 3 Sales of Sweet Spreads by Category: % Volume Growth 2016-2021

% volume growth	2020/21	2016-21 CAGR	2016/21 Total
Sweet Spreads	Data removed from sample		
Jams and Preserves			
Honey			

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 7 Distribution of Sweet Spreads by Format: % Value 2016-2021

% retail value rsp	2016	2017	2018	2019	2020	2021
Store-Based Retailing	Data removed from sample					
- Grocery Retailers						
-- Modern Grocery Retailers						
--- Convenience Stores						
--- Discounters						
--- Forecourt Retailers						
--- Hypermarkets						
--- Supermarkets						
-- Traditional Grocery Retailers						
--- Food/drink/tobacco specialists						
--- Independent Small Grocers						
--- Other Grocery Retailers						
- Non-Grocery Specialists						
-- Health and Beauty Specialist Retailers						
-- Other Foods Non-Grocery Specialists						
- Mixed Retailers						
Non-Store Retailing						
- Vending						
- Homeshopping						
- E-Commerce						
- Direct Selling						
Total						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 8 Forecast Sales of Sweet Spreads by Category: Volume 2021-2026

'000 tonnes	2021	2022	2023	2024	2025	2026
Sweet Spreads	Data removed from sample					
Jams and Preserves						
Honey						
Chocolate Spreads						
Nut and Seed Based Spreads						

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 9 Forecast Sales of Sweet Spreads by Category: Value 2021-2026

EUR million

	2021	2022	2023	2024	2025	2026
Sweet Spreads	Data removed from sample					
Jams and Preserves						
Honey						
Chocolate Spreads						
Nut and Seed Based Spreads						

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 10 Forecast Sales of Sweet Spreads by Category: % Volume Growth 2021-2026

% volume growth

	2021/22	2021-26 CAGR	2021/26 Total
Sweet Spreads	Data removed from sample		
Jams and Preserves			
Honey			
Chocolate Spreads			
Nut and Seed Based Spreads			

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 11 Forecast Sales of Sweet Spreads by Category: % Value Growth 2021-2026

% constant value growth

	2021/2022	2021-26 CAGR	2021/26 Total
Sweet Spreads	Data removed from sample		
Jams and Preserves			
Honey			
Chocolate Spreads			
Nut and Seed Based Spreads			

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

COOKING INGREDIENTS AND MEALS IN ESTONIA - INDUSTRY OVERVIEW

EXECUTIVE SUMMARY

Cooking ingredients and meals in 2021: The big picture

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Key trends in 2021

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Competitive landscape

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Channel developments

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What next for cooking ingredients and meals?

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MARKET DATA

Table 12 Sales of Cooking Ingredients and Meals by Category: Volume 2016-2021

	2016	2017	2018	2019	2020	2021
Ready Meals ('000 tonnes)	Data removed from sample					
Soup ('000 tonnes)						
Sauces, Dressings and Condiments ('000 tonnes)						
Sweet Spreads ('000 tonnes)						
Edible Oils (million litres)						
Cooking Ingredients and Meals (Not calculable)						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 13 Sales of Cooking Ingredients and Meals by Category: Value 2016-2021

EUR million	2016	2017	2018	2019	2020	2021
Ready Meals	Data removed from sample					
Soup						
Sauces, Dressings and Condiments						
Sweet Spreads						
Cooking Ingredients and Meals						
Edible Oils						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 14 Sales of Cooking Ingredients and Meals by Category: % Volume Growth 2016-2021

% volume growth	2020/21	2016-21 CAGR	2016/21 Total
Ready Meals	Data removed from sample		
Soup			
Sauces, Dressings and Condiments			
Sweet Spreads			
Edible Oils			
Cooking Ingredients and Meals			

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 15 Sales of Cooking Ingredients and Meals by Category: % Value Growth 2016-2021

% current value growth

	2020/21	2016-21 CAGR	2016/21 Total
Ready Meals	Data removed from sample		
Soup			
Sauces, Dressings and Condiments			
Sweet Spreads			
Cooking Ingredients and Meals			
Edible Oils			

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 16 NBO Company Shares of Cooking Ingredients and Meals: % Value 2017-2021

% retail value rsp Company	2017	2018	2019	2020	2021
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Data removed from sample					
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Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 17 LBN Brand Shares of Cooking Ingredients and Meals: % Value 2018-2021

% retail value rsp Brand (GBO)	Company (NBO)	2018	2019	2020	2021
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Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 18 Distribution of Cooking Ingredients and Meals by Format: % Value 2016-2021

% retail value rsp	2016	2017	2018	2019	2020	2021
Store-Based Retailing	Data removed from sample					
- Grocery Retailers						
-- Modern Grocery Retailers						
--- Convenience Stores						
--- Discounters						
--- Forecourt Retailers						
--- Hypermarkets						
--- Supermarkets						
-- Traditional Grocery Retailers						
--- Food/drink/tobacco specialists						
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--- Other Grocery Retailers						
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-- Other Foods Non-Grocery Specialists						
- Mixed Retailers						
Non-Store Retailing						
- Vending						
- Homeshopping						
- E-Commerce						
- Direct Selling						
Total						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 19 Forecast Sales of Cooking Ingredients and Meals by Category: Volume 2021-2026

	2021	2022	2023	2024	2025	2026
Ready Meals ('000 tonnes)	Data removed from sample					
Soup ('000 tonnes)						
Sauces, Dressings and Condiments ('000 tonnes)						
Sweet Spreads ('000 tonnes)						
Edible Oils (million litres)						
Cooking Ingredients and Meals (Not calculable)						

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 20 Forecast Sales of Cooking Ingredients and Meals by Category: Value 2021-2026

EUR million	2021	2022	2023	2024	2025	2026
Ready Meals	Data removed from sample					
Soup						
Sauces, Dressings and Condiments						
Sweet Spreads						
Cooking Ingredients and Meals						
Edible Oils						

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 21 Forecast Sales of Cooking Ingredients and Meals by Category: % Volume Growth 2021-2026

% volume growth	2021/22	2021-26 CAGR	2021/26 Total
Ready Meals	Data removed from sample		
Soup			
Sauces, Dressings and Condiments			
Sweet Spreads			
Edible Oils			
Cooking Ingredients and Meals			

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 22 Forecast Sales of Cooking Ingredients and Meals by Category: % Value Growth 2021-2026

% constant value growth	2021/2022	2021-26 CAGR	2021/26 Total
Ready Meals	Data removed from sample		
Soup			
Sauces, Dressings and Condiments			
Sweet Spreads			
Cooking Ingredients and Meals			
Edible Oils			

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

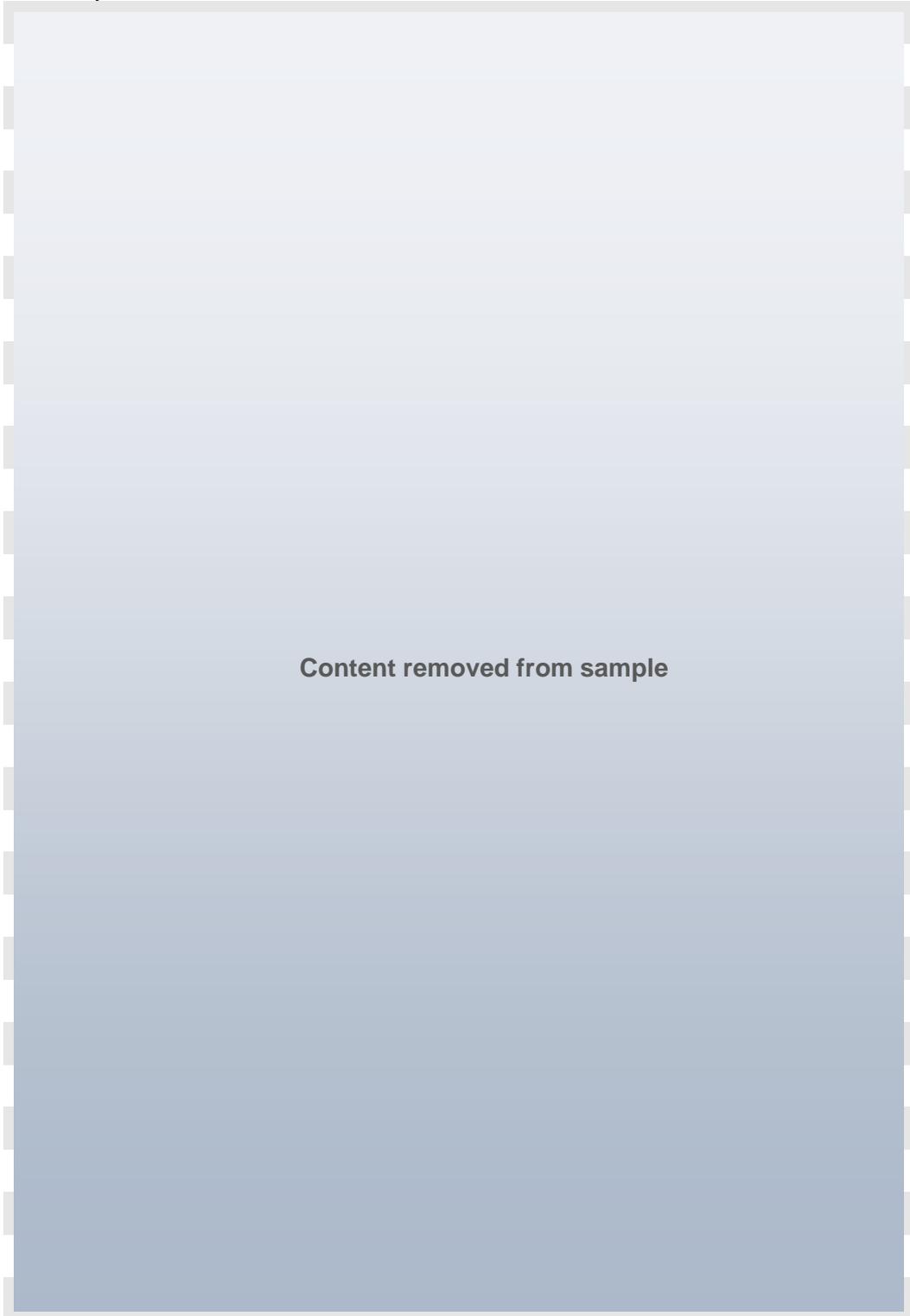
DISCLAIMER

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SOURCES

Sources used during research include the following:

Summary 1 Research Sources





Source: Euromonitor International