



Passport

Rice, Pasta and Noodles in Estonia

Euromonitor International

November 2022

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Some content and data have been
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RICE, PASTA AND NOODLES IN ESTONIA - CATEGORY ANALYSIS

KEY DATA FINDINGS

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2021 DEVELOPMENTS

Expanding range of sauces contributes to pasta growth

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Japanese home cooking contributes to rice sales growth

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Industria Agricola Carredana SA de CV leads rice category

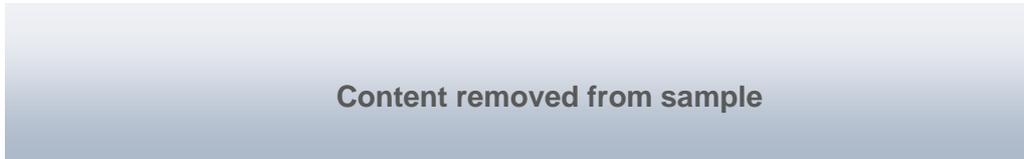
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PROSPECTS AND OPPORTUNITIES

Growing popularity of Italian cuisine will stimulate pasta sales

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A wide range of rice in terms of calories will increase the target market audience



Popularity of Asian cuisine promotes development of foodservice



CATEGORY DATA

Table 1 Sales of Rice, Pasta and Noodles by Category: Volume 2016-2021

'000 tonnes	2016	2017	2018	2019	2020	2021
Rice	Data removed from sample					
- Dried Pasta						
- Chilled Pasta						
Pasta						
- Plain Noodles						
-- Instant Noodle Pouches						
-- Instant Noodle Cups						
- Instant Noodles						
- Frozen Noodles						
- Chilled Noodles						
Noodles						
Rice, Pasta and Noodles						

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

Table 2 Sales of Rice, Pasta and Noodles by Category: Value 2016-2021

EUR million	2016	2017	2018	2019	2020	2021
Rice	Data removed from sample					
- Dried Pasta						
- Chilled Pasta						
Pasta						
- Plain Noodles						
-- Instant Noodle Pouches						
-- Instant Noodle Cups						
- Instant Noodles						
- Frozen Noodles						
- Chilled Noodles						

Noodles
Rice, Pasta and Noodles

Data removed from sample

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

Table 3 Sales of Rice, Pasta and Noodles by Category: % Volume Growth 2016-2021

% volume growth

2020/21 2016-21 CAGR 2016/21 Total

Rice
- Dried Pasta
- Chilled Pasta
Pasta
- Plain Noodles
-- Instant Noodle Pouches
-- Instant Noodle Cups
- Instant Noodles
- Frozen Noodles
- Chilled Noodles
Noodles
Rice, Pasta and Noodles

Data removed from sample

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

Table 4 Sales of Rice, Pasta and Noodles by Category: % Value Growth 2016-2021

% current value growth

2020/21 2016-21 CAGR 2016/21 Total

Rice
- Dried Pasta
- Chilled Pasta
Pasta
- Plain Noodles
-- Instant Noodle Pouches
-- Instant Noodle Cups
- Instant Noodles
- Frozen Noodles
- Chilled Noodles
Noodles
Rice, Pasta and Noodles

Data removed from sample

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

Table 5 NBO Company Shares of Rice, Pasta and Noodles: % Value 2017-2021

% retail value rsp
Company

2017 2018 2019 2020 2021

Data removed from sample

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

Table 6 LBN Brand Shares of Rice, Pasta and Noodles: % 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 7 NBO Company Shares of Rice: % Value 2017-2021

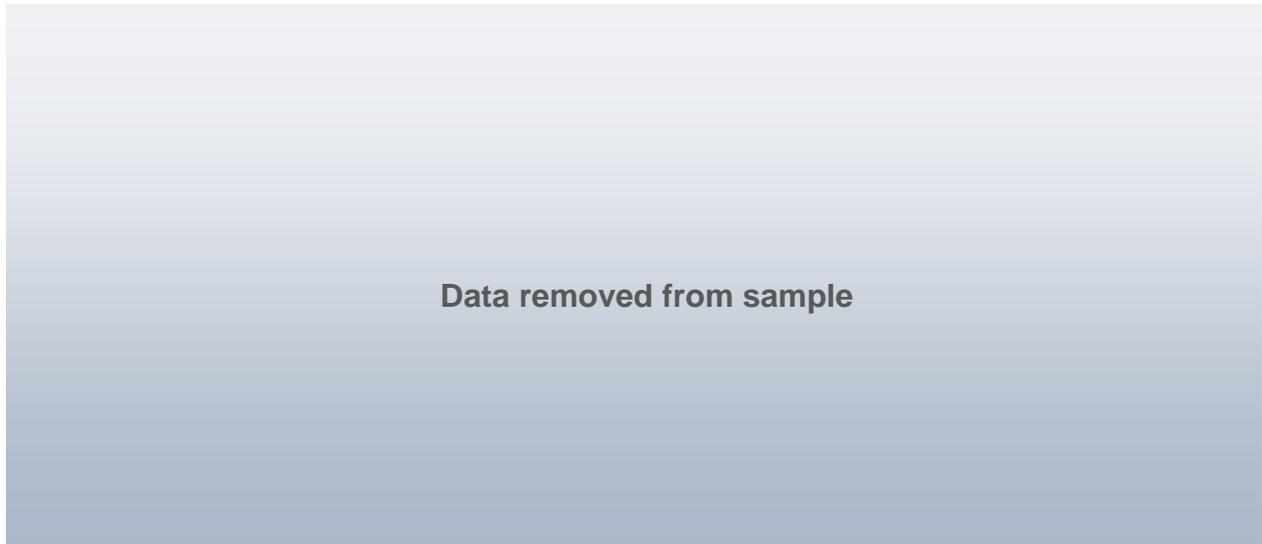
% retail value rsp Company	2017	2018	2019	2020	2021
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Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 8 LBN Brand Shares of Rice: % Value 2018-2021

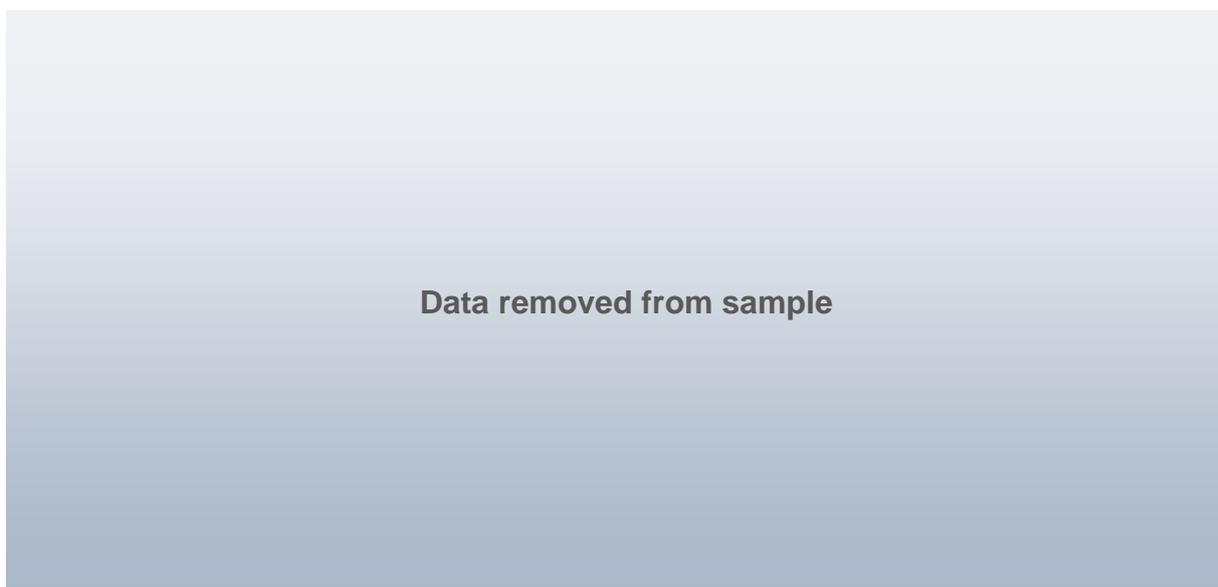
% retail value rsp Brand (GBO)	Company (NBO)	2018	2019	2020	2021
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Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 9 NBO Company Shares of Pasta: % Value 2017-2021

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

Table 10 LBN Brand Shares of Pasta: % Value 2018-2021

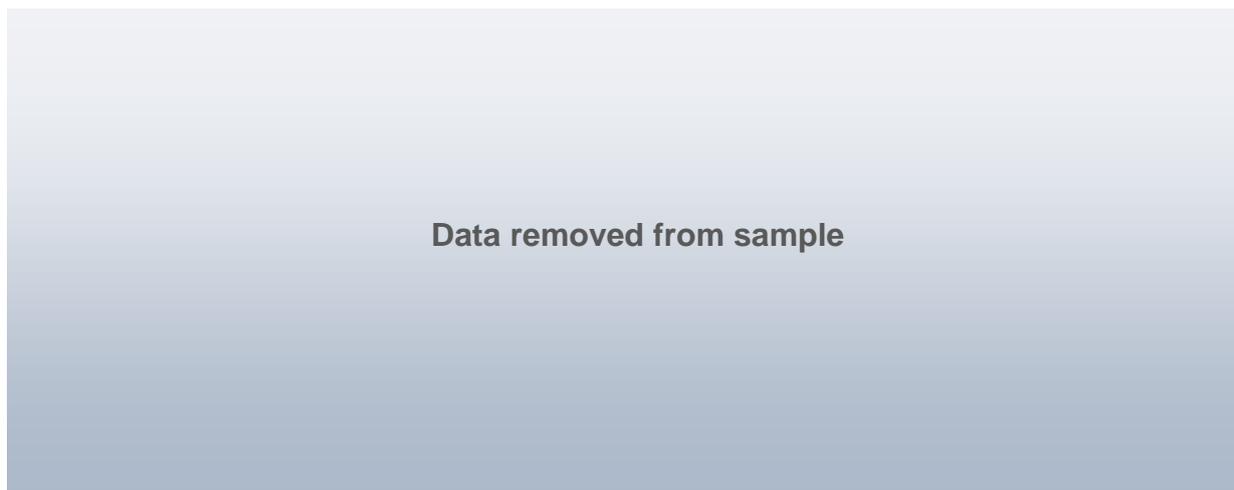
% retail value rsp Brand (GBO)	Company (NBO)	2018	2019	2020	2021
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Data removed from sample

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

Table 11 NBO Company Shares of Noodles: % Value 2017-2021

% retail value rsp Company	2017	2018	2019	2020	2021
-------------------------------	------	------	------	------	------



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

Table 12 LBN Brand Shares of Noodles: % Value 2018-2021

% retail value rsp Brand (GBO)	Company (NBO)	2018	2019	2020	2021
-----------------------------------	---------------	------	------	------	------



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

Table 13 Distribution of Rice, Pasta and Noodles by Format: % Value 2016-2021

% retail value rsp	2016	2017	2018	2019	2020	2021
Retail Channels	Data removed from sample					
- Retail Offline						
-- Grocery Retailers						
--- Convenience Retail						
---- Convenience Stores						
---- Forecourt Retailers						
--- Supermarkets						
--- Hypermarkets						
--- Discounters						
--- Warehouse Clubs						
--- Food/drink/tobacco specialists						
--- Small Local Grocers						
-- Non-Grocery Retailers						
--- General Merchandise Stores						
--- Apparel and Footwear Specialists						
--- Appliances and Electronics Specialists						
--- Home Products Specialists						
--- Health and Beauty Specialists						
--- Leisure and Personal Goods Specialists						
--- Other Non-Grocery Retailers						
-- Vending						
-- Direct Selling						
- Retail E-Commerce						
Total						

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

Table 14 Distribution of Rice by Format: % Value 2016-2021

% retail value rsp	2016	2017	2018	2019	2020	2021
Retail Channels	Data removed from sample					
- Retail Offline						
-- Grocery Retailers						
--- Convenience Retail						
---- Convenience Stores						
---- Forecourt Retailers						
--- Supermarkets						
--- Hypermarkets						
--- Discounters						
--- Warehouse Clubs						
--- Food/drink/tobacco						

- specialists
- Small Local Grocers
- Non-Grocery Retailers
- General Merchandise Stores
- Apparel and Footwear Specialists
- Appliances and Electronics Specialists
- Home Products Specialists
- Health and Beauty Specialists
- Leisure and Personal Goods Specialists
- Other Non-Grocery Retailers
- Vending
- Direct Selling
- Retail E-Commerce
- Total

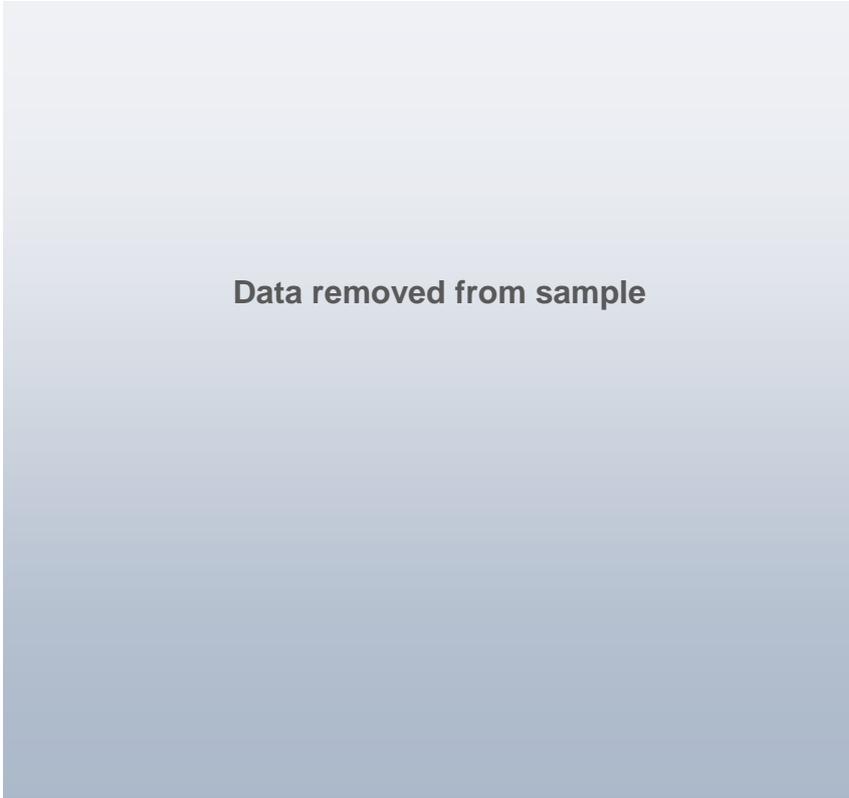


Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 15 Distribution of Pasta by Format: % Value 2016-2021

% retail value rsp

	2016	2017	2018	2019	2020	2021
Retail Channels						
- Retail Offline						
-- Grocery Retailers						
--- Convenience Retail						
---- Convenience Stores						
---- Forecourt Retailers						
--- Supermarkets						
--- Hypermarkets						
--- Discounters						
--- Warehouse Clubs						
--- Food/drink/tobacco specialists						
--- Small Local Grocers						
-- Non-Grocery Retailers						
--- General Merchandise Stores						
--- Apparel and Footwear Specialists						
--- Appliances and Electronics Specialists						
--- Home Products Specialists						
--- Health and Beauty Specialists						
--- Leisure and Personal Goods Specialists						
--- Other Non-Grocery Retailers						



-- Vending
 -- Direct Selling
 - Retail E-Commerce
 Total

Data removed from sample

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

Table 16 Distribution of Noodles by Format: % Value 2016-2021

% retail value rsp

	2016	2017	2018	2019	2020	2021
Retail Channels	Data removed from sample					
- Retail Offline						
-- Grocery Retailers						
--- Convenience Retail						
---- Convenience Stores						
---- Forecourt Retailers						
--- Supermarkets						
--- Hypermarkets						
--- Discounters						
--- Warehouse Clubs						
--- Food/drink/tobacco specialists						
--- Small Local Grocers						
--- Non-Grocery Retailers						
--- General Merchandise Stores						
--- Apparel and Footwear Specialists						
--- Appliances and Electronics Specialists						
--- Home Products Specialists						
--- Health and Beauty Specialists						
--- Leisure and Personal Goods Specialists						
--- Other Non-Grocery Retailers						
-- Vending						
-- Direct Selling						
- Retail E-Commerce						
Total						

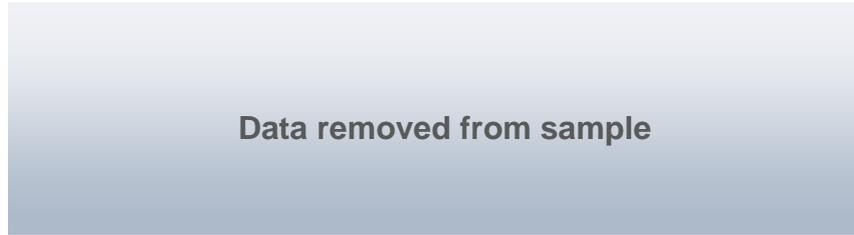
Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 17 Forecast Sales of Rice, Pasta and Noodles by Category: Volume 2021-2026

'000 tonnes

	2021	2022	2023	2024	2025	2026
Rice	Data removed from sample					
- Dried Pasta						
- Chilled Pasta						
Pasta						

- Plain Noodles
- Instant Noodle Pouches
- Instant Noodle Cups
- Instant Noodles
- Frozen Noodles
- Chilled Noodles
- Noodles
- Rice, Pasta and Noodles



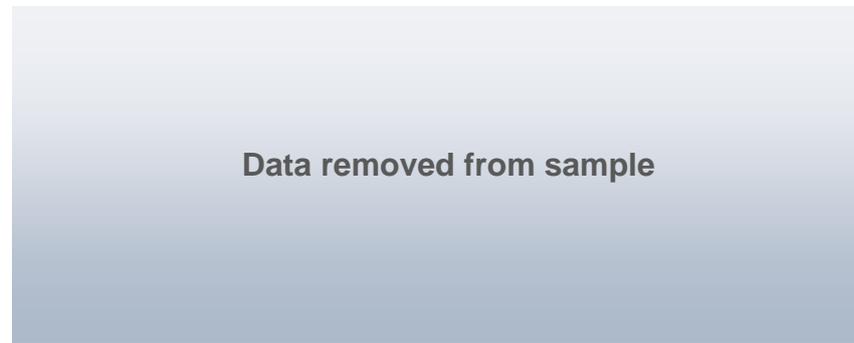
Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 18 Forecast Sales of Rice, Pasta and Noodles by Category: Value 2021-2026

EUR million

2021 2022 2023 2024 2025 2026

- Rice
- Dried Pasta
- Chilled Pasta
- Pasta
- Plain Noodles
- Instant Noodle Pouches
- Instant Noodle Cups
- Instant Noodles
- Frozen Noodles
- Chilled Noodles
- Noodles
- Rice, Pasta and Noodles



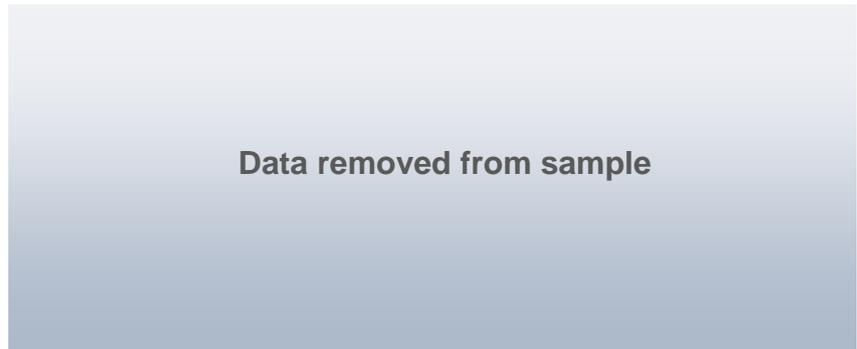
Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 19 Forecast Sales of Rice, Pasta and Noodles by Category: % Volume Growth 2021-2026

% volume growth

2021/22 2021-26 CAGR 2021/26 Total

- Rice
- Dried Pasta
- Chilled Pasta
- Pasta
- Plain Noodles
- Instant Noodle Pouches
- Instant Noodle Cups
- Instant Noodles
- Frozen Noodles
- Chilled Noodles
- Noodles
- Rice, Pasta and Noodles



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

Table 20 Forecast Sales of Rice, Pasta and Noodles by Category: % Value Growth 2021-2026

% constant value growth

2021/2022

2021-26 CAGR

2021/26 Total

Rice

- Dried Pasta

- Chilled Pasta

Pasta

- Plain Noodles

-- Instant Noodle Pouches

-- Instant Noodle Cups

- Instant Noodles

- Frozen Noodles

- Chilled Noodles

Noodles

Rice, Pasta and Noodles

Data removed from sample

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

STAPLE FOODS IN ESTONIA - INDUSTRY OVERVIEW

EXECUTIVE SUMMARY

Staple foods in 2021: healthy food contributes staples

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Key trends in 2022

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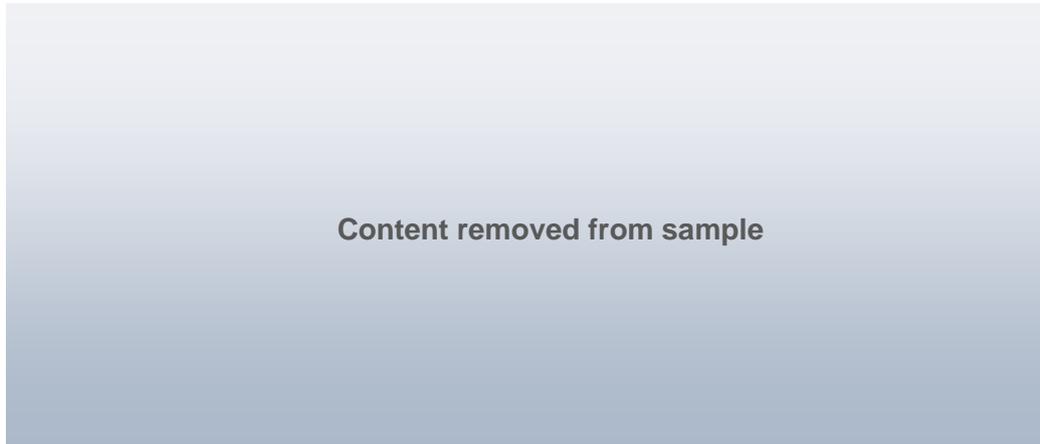
Competitive landscape

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Channel developments

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What next for staple foods?



MARKET DATA

Table 21 Sales of Staple Foods by Category: Volume 2016-2021

'000 tonnes	2016	2017	2018	2019	2020	2021
Rice, Pasta and Noodles	Data removed from sample					
Processed Meat, Seafood and Alternatives to Meat						
Processed Fruit and Vegetables						
Breakfast Cereals						
Baked Goods						
Staple Foods						

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

Table 22 Sales of Staple Foods by Category: Value 2016-2021

EUR million	2016	2017	2018	2019	2020	2021
Rice, Pasta and Noodles	Data removed from sample					
Processed Meat, Seafood and Alternatives to Meat						
Processed Fruit and Vegetables						
Breakfast Cereals						
Baked Goods						
Staple Foods						

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

Table 23 Sales of Staple Foods by Category: % Volume Growth 2016-2021

% volume growth	2020/21	2016-21 CAGR	2016/21 Total
Rice, Pasta and Noodles	Data removed from sample		
Processed Meat, Seafood and Alternatives to Meat			
Processed Fruit and Vegetables			
Breakfast Cereals			
Baked Goods			
Staple Foods			

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

Table 24 Sales of Staple Foods by Category: % Value Growth 2016-2021

% current value growth	2020/21	2016-21 CAGR	2016/21 Total
Rice, Pasta and Noodles	Data removed from sample		
Processed Meat, Seafood and Alternatives to Meat			
Processed Fruit and Vegetables			
Breakfast Cereals			
Baked Goods			
Staple Foods			

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

Table 25 NBO Company Shares of Staple Foods: % Value 2017-2021

% retail value rsp Company	2017	2018	2019	2020	2021
Data removed from sample					

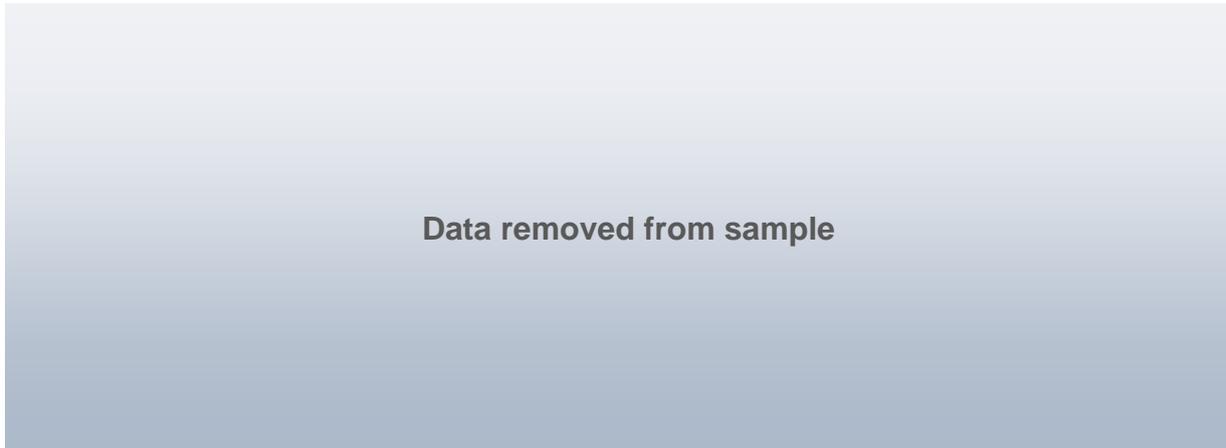
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Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 26 LBN Brand Shares of Staple Foods: % Value 2018-2021

% retail value rsp Brand (GBO)	Company (NBO)	2018	2019	2020	2021
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Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 27 Penetration of Private Label by Category: % Value 2016-2021

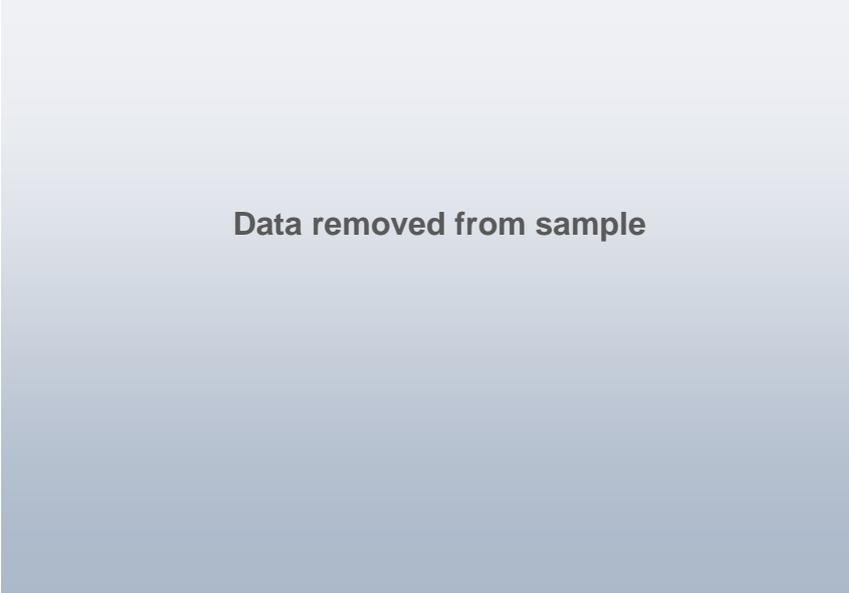
% retail value rsp	2016	2017	2018	2019	2020	2021
Rice, Pasta and Noodles	Data removed from sample					
Processed Meat, Seafood and Alternatives to Meat						
Processed Fruit and Vegetables						
Breakfast Cereals						
Baked Goods						
Staple Foods						

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

Table 28 Distribution of Staple Foods by Format: % Value 2016-2021

% retail value rsp	2016	2017	2018	2019	2020	2021
Retail Channels	Data removed from sample					
- Retail Offline						
-- Grocery Retailers						
--- Convenience Retail						
---- Convenience Stores						
---- Forecourt Retailers						
--- Supermarkets						
--- Hypermarkets						
--- Discounters						
--- Warehouse Clubs						
--- Food/drink/tobacco						

- specialists
- Small Local Grocers
- Non-Grocery Retailers
- General Merchandise Stores
- Apparel and Footwear Specialists
- Appliances and Electronics Specialists
- Home Products Specialists
- Health and Beauty Specialists
- Leisure and Personal Goods Specialists
- Other Non-Grocery Retailers
- Vending
- Direct Selling
- Retail E-Commerce
- Total



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

Table 29 Forecast Sales of Staple Foods by Category: Volume 2021-2026

'000 tonnes

	2021	2022	2023	2024	2025	2026
Rice, Pasta and Noodles	Data removed from sample					
Processed Meat, Seafood and Alternatives to Meat						
Processed Fruit and Vegetables						
Breakfast Cereals						
Baked Goods						
Staple Foods						

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

Table 30 Forecast Sales of Staple Foods by Category: Value 2021-2026

EUR million

	2021	2022	2023	2024	2025	2026
Rice, Pasta and Noodles	Data removed from sample					
Processed Meat, Seafood and Alternatives to Meat						
Processed Fruit and Vegetables						
Breakfast Cereals						
Baked Goods						
Staple Foods						

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

Table 31 Forecast Sales of Staple Foods by Category: % Volume Growth 2021-2026

% volume growth	2021/22	2021-26 CAGR	2021/26 Total
Rice, Pasta and Noodles	Data removed from sample		
Processed Meat, Seafood and Alternatives to Meat			
Processed Fruit and Vegetables			
Breakfast Cereals			
Baked Goods			
Staple Foods			

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

Table 32 Forecast Sales of Staple Foods by Category: % Value Growth 2021-2026

% constant value growth	2021/2022	2021-26 CAGR	2021/26 Total
Rice, Pasta and Noodles	Data removed from sample		
Processed Meat, Seafood and Alternatives to Meat			
Processed Fruit and Vegetables			
Breakfast Cereals			
Baked Goods			
Staple Foods			

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

DISCLAIMER

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SOURCES

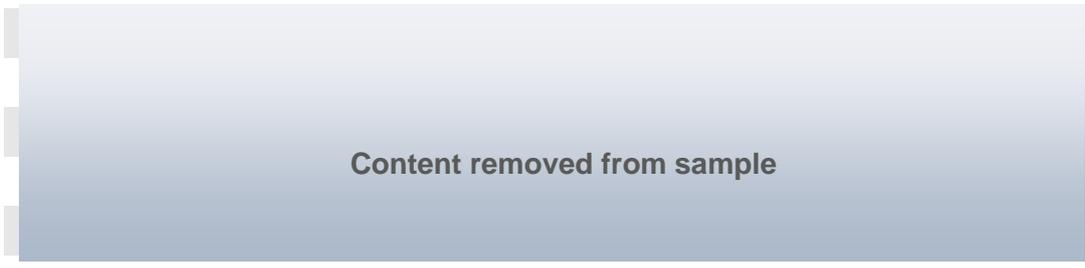
Sources used during research include the following:

Summary 1 Research Sources

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Source: Euromonitor International