

Snacks in Latvia

July 2023

Table of Contents

Snacks in Latvia

EXECUTIVE SUMMARY

Snacks in 2023: The big picture

Key trends in 2023

Competitive Landscape

Channel developments

What next for snacks?

MARKET DATA

Table 1 - Sales of Snacks by Category: Volume 2018-2023

Table 2 - Sales of Snacks by Category: Value 2018-2023

Table 3 - Sales of Snacks by Category: % Volume Growth 2018-2023

Table 4 - Sales of Snacks by Category: % Value Growth 2018-2023

Table 5 - NBO Company Shares of Snacks: % Value 2019-2023

Table 6 - LBN Brand Shares of Snacks: % Value 2020-2023

Table 7 - Penetration of Private Label by Category: % Value 2018-2023

Table 8 - Distribution of Snacks by Format: % Value 2018-2023

Table 9 - Forecast Sales of Snacks by Category: Volume 2023-2028

Table 10 - Forecast Sales of Snacks by Category: Value 2023-2028

Table 11 - Forecast Sales of Snacks by Category: % Volume Growth 2023-2028

Table 12 - Forecast Sales of Snacks by Category: % Value Growth 2023-2028

DISCLAIMER

SOURCES

Summary 1 - Research Sources

Chocolate Confectionery in Latvia

KEY DATA FINDINGS

2023 DEVELOPMENTS

Slight drop in volume sales, as inflation still an issue

Competitive landscape remain stable

Tablets and countlines continue to be popular

PROSPECTS AND OPPORTUNITIES

More affordable brands gain value share

Countlines register highest volume growth

Population decline also dampens volume sales

CATEGORY DATA

Table 13 - Sales of Chocolate Confectionery by Category: Volume 2018-2023

Table 14 - Sales of Chocolate Confectionery by Category: Value 2018-2023

Table 15 - Sales of Chocolate Confectionery by Category: % Volume Growth 2018-2023

Table 16 - Sales of Chocolate Confectionery by Category: % Value Growth 2018-2023

Table 17 - Sales of Chocolate Tablets by Type: % Value 2018-2023

Table 18 - NBO Company Shares of Chocolate Confectionery: % Value 2019-2023

Table 19 - LBN Brand Shares of Chocolate Confectionery: % Value 2020-2023

Table 20 - Distribution of Chocolate Confectionery by Format: % Value 2018-2023

Table 21 - Forecast Sales of Chocolate Confectionery by Category: Volume 2023-2028

Table 22 - Forecast Sales of Chocolate Confectionery by Category: Value 2023-2028

Table 23 - Forecast Sales of Chocolate Confectionery by Category: % Volume Growth 2023-2028

Table 24 - Forecast Sales of Chocolate Confectionery by Category: % Value Growth 2023-2028

Gum in Latvia

KEY DATA FINDINGS

2023 DEVELOPMENTS

Modest volume growth, as on-the-go consumption drives volume sales

Gum landscape concentrated

Bubble gum registers volume decline

PROSPECTS AND OPPORTUNITIES

Muted outlook over forecast period

Healthier gums drive value sales

Sustainability influences product development

CATEGORY DATA

Table 25 - Sales of Gum by Category: Volume 2018-2023

Table 26 - Sales of Gum by Category: Value 2018-2023

Table 27 - Sales of Gum by Category: % Volume Growth 2018-2023

Table 28 - Sales of Gum by Category: % Value Growth 2018-2023

Table 29 - NBO Company Shares of Gum: % Value 2019-2023

Table 30 - LBN Brand Shares of Gum: % Value 2020-2023

Table 31 - Distribution of Gum by Format: % Value 2018-2023

Table 32 - Forecast Sales of Gum by Category: Volume 2023-2028

Table 33 - Forecast Sales of Gum by Category: Value 2023-2028

Table 34 - Forecast Sales of Gum by Category: % Volume Growth 2023-2028

Table 35 - Forecast Sales of Gum by Category: % Value Growth 2023-2028

Sugar Confectionery in Latvia

KEY DATA FINDINGS

2023 DEVELOPMENTS

Mints strongest performer

Russian and Belarusian brands lose value share

Pastilles, gums, jellies and chews register highest volume growth

PROSPECTS AND OPPORTUNITIES

High sugar content dampens volume sales

More focus on healthier positioning

Lidl drives growth in private label

CATEGORY DATA

Table 36 - Sales of Sugar Confectionery by Category: Volume 2018-2023

Table 37 - Sales of Sugar Confectionery by Category: Value 2018-2023

Table 38 - Sales of Sugar Confectionery by Category: % Volume Growth 2018-2023

Table 39 - Sales of Sugar Confectionery by Category: % Value Growth 2018-2023

Table 40 - Sales of Pastilles, Gummies, Jellies and Chews by Type: % Value 2018-2023

Table 41 - NBO Company Shares of Sugar Confectionery: % Value 2019-2023

Table 42 - LBN Brand Shares of Sugar Confectionery: % Value 2020-2023

Table 43 - Distribution of Sugar Confectionery by Format: % Value 2018-2023

Table 44 - Forecast Sales of Sugar Confectionery by Category: Volume 2023-2028

Table 45 - Forecast Sales of Sugar Confectionery by Category: Value 2023-2028

Table 46 - Forecast Sales of Sugar Confectionery by Category: % Volume Growth 2023-2028

Table 47 - Forecast Sales of Sugar Confectionery by Category: % Value Growth 2023-2028

Ice Cream in Latvia

KEY DATA FINDINGS

2023 DEVELOPMENTS

Ice cream star performer in 2023

Rigas Piena Kombinats maintains leading position

Multi-pack dairy ice cream gaining popularity

PROSPECTS AND OPPORTUNITIES

Moderate outlook over forecast period

Players push to increase consumption during winter months

Discounter Lidl to shake-up the landscape

CATEGORY DATA

Table 48 - Sales of Ice Cream by Category: Volume 2018-2023

Table 49 - Sales of Ice Cream by Category: Value 2018-2023

Table 50 - Sales of Ice Cream by Category: % Volume Growth 2018-2023

Table 51 - Sales of Ice Cream by Category: % Value Growth 2018-2023

Table 52 - NBO Company Shares of Ice Cream: % Value 2019-2023

Table 53 - LBN Brand Shares of Ice Cream: % Value 2020-2023

Table 54 - Distribution of Ice Cream by Format: % Value 2018-2023

Table 55 - Forecast Sales of Ice Cream by Category: Volume 2023-2028

Table 56 - Forecast Sales of Ice Cream by Category: Value 2023-2028

Table 57 - Forecast Sales of Ice Cream by Category: % Volume Growth 2023-2028

Table 58 - Forecast Sales of Ice Cream by Category: % Value Growth 2023-2028

Savoury Snacks in Latvia

KEY DATA FINDINGS

2023 DEVELOPMENTS

Marginal volume increase in what is a mature product area

No changes in competitive landscape

Savoury snacks with healthier positioning gain value share

PROSPECTS AND OPPORTUNITIES

Modest growth over forecast period

Lidl set to increase the value share of private label over the forecast period

Savoury snacks benefit from the growing on-the-go trend

CATEGORY DATA

Table 59 - Sales of Savoury Snacks by Category: Volume 2018-2023

Table 60 - Sales of Savoury Snacks by Category: Value 2018-2023

Table 61 - Sales of Savoury Snacks by Category: % Volume Growth 2018-2023

Table 62 - Sales of Savoury Snacks by Category: % Value Growth 2018-2023

Table 63 - NBO Company Shares of Savoury Snacks: % Value 2019-2023

Table 64 - LBN Brand Shares of Savoury Snacks: % Value 2020-2023

Table 65 - Distribution of Savoury Snacks by Format: % Value 2018-2023

Table 66 - Forecast Sales of Savoury Snacks by Category: Volume 2023-2028

Table 67 - Forecast Sales of Savoury Snacks by Category: Value 2023-2028

Table 68 - Forecast Sales of Savoury Snacks by Category: % Volume Growth 2023-2028

Table 69 - Forecast Sales of Savoury Snacks by Category: % Value Growth 2023-2028

Sweet Biscuits, Snack Bars and Fruit Snacks in Latvia

KEY DATA FINDINGS

2023 DEVELOPMENTS

Significant fall in volume sales, as inflation bites

Orkla consolidates significant lead

Snack bars fare better

PROSPECTS AND OPPORTUNITIES

Mixed picture over the forecast period

Products with functional ingredients a key growth area

Significant growth for protein/energy bars, though from low base

CATEGORY DATA

Table 70 - Sales of Sweet Biscuits, Snack Bars and Fruit Snacks by Category: Volume 2018-2023

Table 71 - Sales of Sweet Biscuits, Snack Bars and Fruit Snacks by Category: Value 2018-2023

Table 72 - Sales of Sweet Biscuits, Snack Bars and Fruit Snacks by Category: % Volume Growth 2018-2023

Table 73 - Sales of Sweet Biscuits, Snack Bars and Fruit Snacks by Category: % Value Growth 2018-2023

Table 74 - NBO Company Shares of Sweet Biscuits, Snack Bars and Fruit Snacks: % Value 2019-2023

Table 75 - LBN Brand Shares of Sweet Biscuits, Snack Bars and Fruit Snacks: % Value 2020-2023

Table 76 - NBO Company Shares of Sweet Biscuits: % Value 2019-2023

Table 77 - LBN Brand Shares of Sweet Biscuits: % Value 2020-2023

Table 78 - NBO Company Shares of Snack Bars: % Value 2019-2023

Table 79 - LBN Brand Shares of Snack Bars: % Value 2020-2023

Table 80 - NBO Company Shares of Fruit Snacks: % Value 2019-2023

Table 81 - LBN Brand Shares of Fruit Snacks: % Value 2020-2023

Table 82 - Distribution of Sweet Biscuits, Snack Bars and Fruit Snacks by Format: % Value 2018-2023

Table 83 - Distribution of Sweet Biscuits by Format: % Value 2018-2023

Table 84 - Distribution of Snack Bars by Format: % Value 2018-2023

Table 85 - Distribution of Fruit Snacks by Format: % Value 2018-2023

Table 86 - Forecast Sales of Sweet Biscuits, Snack Bars and Fruit Snacks by Category: Volume 2023-2028

Table 87 - Forecast Sales of Sweet Biscuits, Snack Bars and Fruit Snacks by Category: Value 2023-2028

Table 88 - Forecast Sales of Sweet Biscuits, Snack Bars and Fruit Snacks by Category: % Volume Growth 2023-2028

Table 89 - Forecast Sales of Sweet Biscuits, Snack Bars and Fruit Snacks by Category: % Value Growth 2023-2028

About Euromonitor International

Euromonitor International is an independent market intelligence provider. Data, insight and analysis stem from in-the-field research spanning 210 national markets.

Content ranges from the in-depth and country-specific, to key strategic themes with a global range and significance. Products cover a comprehensive range of insights and market data, but can be broadly categorised as:

- **Strategy Briefings:** Global or regional in scope, and focussing on the most important themes shaping consumer demand, the key markets, competitive environment and future outlook across a range of industries.
- **Company Profiles:** Analysis dedicated to the world's most significant companies, with detailed insight into their activities, focus of operations, their competitors, their geographic presence and performance.
- **Country Reports:** For an in-depth understanding of specific countries, whether by industry, economic metrics or consumer trends and lifestyles. These reports cover current trends, consumer demand, market potential and future prospects, with country-specific local insight and comprehensive data, unavailable elsewhere.

For more information on this report, further enquiries can be directed via this link www.euromonitor.com/snacks-in-latvia/report.