

# Staple Foods in Serbia

November 2023

**Table of Contents** 

#### Staple Foods in Serbia

#### **EXECUTIVE SUMMARY**

Staple foods in 2023: The big picture

Key trends in 2023

Competitive Landscape

Channel developments

What next for staple foods?

#### MARKET DATA

- Table 1 Sales of Staple Foods by Category: Volume 2018-2023
- Table 2 Sales of Staple Foods by Category: Value 2018-2023
- Table 3 Sales of Staple Foods by Category: % Volume Growth 2018-2023
- Table 4 Sales of Staple Foods by Category: % Value Growth 2018-2023
- Table 5 NBO Company Shares of Staple Foods: % Value 2019-2023
- Table 6 LBN Brand Shares of Staple Foods: % Value 2020-2023
- Table 7 Penetration of Private Label by Category: % Value 2019-2023
- Table 8 Distribution of Staple Foods by Format: % Value 2018-2023
- Table 9 Forecast Sales of Staple Foods by Category: Volume 2023-2028
- Table 10 Forecast Sales of Staple Foods by Category: Value 2023-2028
- Table 11 Forecast Sales of Staple Foods by Category: % Volume Growth 2023-2028
- Table 12 Forecast Sales of Staple Foods by Category: % Value Growth 2023-2028

#### DISCLAIMER

#### **SOURCES**

Summary 1 - Research Sources

## Baked Goods in Serbia

# KEY DATA FINDINGS

## 2023 DEVELOPMENTS

Price limit imposed for bread made with T-500 flour

Competitive landscape continues to be fragmented

Modern grocery retailers continue to gain value share

#### PROSPECTS AND OPPORTUNITIES

Continuation of price controls, as long as inflation remains high

Growing interest in healthier bread products

Frozen baked goods registers double-value current value growth

#### **CATEGORY DATA**

- Table 13 Sales of Baked Goods by Category: Volume 2018-2023
- Table 14 Sales of Baked Goods by Category: Value 2018-2023
- Table 15 Sales of Baked Goods by Category: % Volume Growth 2018-2023
- Table 16 Sales of Baked Goods by Category: % Value Growth 2018-2023
- Table 17 NBO Company Shares of Baked Goods: % Value 2019-2023
- Table 18 LBN Brand Shares of Baked Goods: % Value 2020-2023
- Table 19 Distribution of Baked Goods by Format: % Value 2018-2023
- Table 20 Forecast Sales of Baked Goods by Category: Volume 2023-2028
- Table 21 Forecast Sales of Baked Goods by Category: Value 2023-2028
- Table 22 Forecast Sales of Baked Goods by Category: % Volume Growth 2023-2028
- Table 23 Forecast Sales of Baked Goods by Category: % Value Growth 2023-2028

#### Breakfast Cereals in Serbia

#### **KEY DATA FINDINGS**

#### 2023 DEVELOPMENTS

Healthy growth, as consumers appreciate convenience

Two leaders continue to hold on to their strong lead

Healthier cereals popular choice

## PROSPECTS AND OPPORTUNITIES

Positive outlook over forecast period

Continuing focus on health credentials

Rising demand for on-the-go options

#### **CATEGORY DATA**

Table 24 - Sales of Breakfast Cereals by Category: Volume 2018-2023

Table 25 - Sales of Breakfast Cereals by Category: Value 2018-2023

Table 26 - Sales of Breakfast Cereals by Category: % Volume Growth 2018-2023

Table 27 - Sales of Breakfast Cereals by Category: % Value Growth 2018-2023

Table 28 - NBO Company Shares of Breakfast Cereals: % Value 2019-2023

Table 29 - LBN Brand Shares of Breakfast Cereals: % Value 2020-2023

Table 30 - Distribution of Breakfast Cereals by Format: % Value 2018-2023

Table 31 - Forecast Sales of Breakfast Cereals by Category: Volume 2023-2028

Table 32 - Forecast Sales of Breakfast Cereals by Category: Value 2023-2028

Table 33 - Forecast Sales of Breakfast Cereals by Category: % Volume Growth 2023-2028

Table 34 - Forecast Sales of Breakfast Cereals by Category: % Value Growth 2023-2028

## Processed Fruit and Vegetables in Serbia

#### **KEY DATA FINDINGS**

# 2023 DEVELOPMENTS

Positive volume growth in 2023

Frikom continues to lead, underlining its leadership with regular promotions

Frozen products remain the most popular

#### PROSPECTS AND OPPORTUNITIES

Moderate outlook over forecast period

Status quo remains

Health concerns limit consumption of shelf stable fruit

#### **CATEGORY DATA**

Table 35 - Sales of Processed Fruit and Vegetables by Category: Volume 2018-2023

Table 36 - Sales of Processed Fruit and Vegetables by Category: Value 2018-2023

Table 37 - Sales of Processed Fruit and Vegetables by Category: % Volume Growth 2018-2023

 $\textbf{Table 38 - Sales of Processed Fruit and Vegetables by Category: } \\ \text{Value Growth 2018-2023}$ 

Table 39 - NBO Company Shares of Processed Fruit and Vegetables: % Value 2019-2023

Table 40 - LBN Brand Shares of Processed Fruit and Vegetables: % Value 2020-2023

Table 41 - Distribution of Processed Fruit and Vegetables by Format: % Value 2018-2023

Table 42 - Forecast Sales of Processed Fruit and Vegetables by Category: Volume 2023-2028

Table 43 - Forecast Sales of Processed Fruit and Vegetables by Category: Value 2023-2028

Table 44 - Forecast Sales of Processed Fruit and Vegetables by Category: % Volume Growth 2023-2028

Table 45 - Forecast Sales of Processed Fruit and Vegetables by Category: % Value Growth 2023-2028

#### Processed Meat, Seafood and Alternatives To Meat in Serbia

#### **KEY DATA FINDINGS**

#### 2023 DEVELOPMENTS

Slight increase in volume sales

Modern grocery retailers continue to gain value share

Local players continue to dominate

## PROSPECTS AND OPPORTUNITIES

Moderate outlook over forecast period

Consumers increasingly health conscious

Some growth in alternatives to meat

#### **CATEGORY DATA**

Table 46 - Sales of Processed Meat, Seafood and Alternatives to Meat by Category: Volume 2018-2023

Table 47 - Sales of Processed Meat, Seafood and Alternatives to Meat by Category: Value 2018-2023

Table 48 - Sales of Processed Meat, Seafood and Alternatives to Meat by Category: % Volume Growth 2018-2023

Table 49 - Sales of Processed Meat, Seafood and Alternatives to Meat by Category: % Value Growth 2018-2023

Table 50 - NBO Company Shares of Processed Meat, Seafood and Alternatives to Meat: % Value 2019-2023

Table 51 - LBN Brand Shares of Processed Meat, Seafood and Alternatives to Meat: % Value 2020-2023

Table 52 - Distribution of Processed Meat, Seafood and Alternatives to Meat by Format: % Value 2018-2023

Table 53 - Forecast Sales of Processed Meat, Seafood and Alternatives to Meat by Category: Volume 2023-2028

Table 54 - Forecast Sales of Processed Meat, Seafood and Alternatives to Meat by Category: Value 2023-2028

#### Rice, Pasta and Noodles in Serbia

#### **KEY DATA FINDINGS**

## 2023 DEVELOPMENTS

Varying performance for rice, pasta and noodles in 2023

Status quo remains in 2023

Robust advertising activity supports the positions of the leading brands in pasta

## PROSPECTS AND OPPORTUNITIES

Role as key staple supports growth

Noodles registers highest volume growth

Players tap into increasing demand for health benefits

#### CATEGORY DATA

Table 55 - Sales of Rice, Pasta and Noodles by Category: Volume 2018-2023

Table 56 - Sales of Rice, Pasta and Noodles by Category: Value 2018-2023

Table 57 - Sales of Rice, Pasta and Noodles by Category: % Volume Growth 2018-2023

Table 58 - Sales of Rice, Pasta and Noodles by Category: % Value Growth 2018-2023

Table 59 - NBO Company Shares of Rice, Pasta and Noodles: % Value 2019-2023

Table 60 - LBN Brand Shares of Rice, Pasta and Noodles: % Value 2020-2023

Table 61 - NBO Company Shares of Rice: % Value 2019-2023

Table 62 - LBN Brand Shares of Rice: % Value 2020-2023

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

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

Table 65 - NBO Company Shares of Noodles: % Value 2019-2023

Table 66 - LBN Brand Shares of Noodles: % Value 2020-2023

Table 67 - Distribution of Rice, Pasta and Noodles by Format: % Value 2018-2023

Table 68 - Distribution of Rice by Format: % Value 2018-2023

- Table 69 Distribution of Pasta by Format: % Value 2018-2023
- Table 70 Distribution of Noodles by Format: % Value 2018-2023
- Table 71 Forecast Sales of Rice, Pasta and Noodles by Category: Volume 2023-2028
- Table 72 Forecast Sales of Rice, Pasta and Noodles by Category: Value 2023-2028
- Table 73 Forecast Sales of Rice, Pasta and Noodles by Category: % Volume Growth 2023-2028
- Table 74 Forecast Sales of Rice, Pasta and Noodles 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/staple-foods-in-serbia/report.