Euromonitor International

Staple Foods in Bosnia and Herzegovina

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Staple Foods in Bosnia and Herzegovina

EXECUTIVE SUMMARY

Positive sales continue, with value supported by high prices and volume meeting baseline demand

KEY DATA FINDINGS

INDUSTRY PERFORMANCE

Essential nature of products in staple foods supports ongoing demand
Health and wellness trends continue to influence product innovations and purchasing behaviours
Various sustainability trends noted in staple foods

WHAT'S NEXT?

Ongoing positive sales supported by baseline demand and elevated prices
A dual focus on health and wellness and cost efficiency expected
Costs remain under pressure and government price controls remain

COMPETITIVE LANDSCAPE

Artisanal producers lead staple foods, thanks to cultural relevance of fresh bread and pastries
Zlatiborac shows strongest growth thanks to premium processed meat and innovative packaging solutions

CHANNELS

Small local grocers remains the leading channel, albeit with supermarkets in hot pursuit
Retail e-commerce sees strong growth from a low base

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Bakes goods sees stable value growth due to inflated prices, while volume remains low

INDUSTRY PERFORMANCE

Price control measures squeeze profit margins on baked goods
Unpackaged pastries benefit from traditional, cultural relevance

WHAT'S NEXT?

Stable growth for baked goods thanks to baseline demand and frequent new product launches to sustain consumer interest
Health and wellness trends will influence new product developments
Sustainability trends gain momentum as waste reduction and energy efficiency drive change

COMPETITIVE LANDSCAPE

Artisanal continues to dominate unpackaged products and overall lead
Gusto E Sapore sees strongest growth thanks to steady gains in packaged cakes

CHANNELS

Specialists continue to lead distribution of baked goods, due to widespread availability and popularity of local bakeries
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Breakfast Cereals in Bosnia and Herzegovina

KEY DATA FINDINGS

2025 DEVELOPMENTS

Positive sales continue, with low and stable volume and high prices supporting value growth

INDUSTRY PERFORMANCE

Baseline demand continues despite high prices, with health and wellness trends playing a part
Hot cereals benefits from wholesome image and convenience

WHAT'S NEXT?

Ongoing positive sales supported by healthy options in breakfast cereals alongside high prices
Health and wellness trends will be key in new product developments
Sustainability gains importance as packaging policies lead the way

COMPETITIVE LANDSCAPE

Nestlé maintains leadership thanks to strong brand image, robust distribution network, and health and wellness innovations
Viola brand benefits from focus on healthy muesli and granola

CHANNELS

Small local grocers remains the leading channel, with supermarkets in hot pursuit
Retail e-commerce continues overall growth trend from a low base

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KEY DATA FINDINGS

2025 DEVELOPMENTS

Baseline demand maintains low volume growth, while high prices support value growth

INDUSTRY PERFORMANCE

Processed options benefit from being more affordable than fresh alternatives
Frozen processed fruit and vegetables align with healthy eating trends

WHAT'S NEXT?

Ongoing positive sales supported by baseline demand and high prices
Health and wellness trends will support sales and inspire new product innovations
Online expansion and sustainable packaging initiatives are supporting developments in processed fruit and vegetables

COMPETITIVE LANDSCAPE

Ledo maintains lead thanks to strong positioning in frozen fruit
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CHANNELS

Small local grocers remains the leading channel, with supermarkets a close second
Retail e-commerce continues overall growth trend from a low base

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KEY DATA FINDINGS

2025 DEVELOPMENTS

A fairly stable performance with baseline demand supporting low volume and high prices supporting stronger value growth

INDUSTRY PERFORMANCE

Value growth supported by inflation pushing up the price of meat
Frozen processed seafood benefits from affordability and convenience

WHAT'S NEXT?

Positive sales will continue, with convenience expected to remain a key sales driver
Health and wellness trends inspire high-protein options
Potential for prices to stabilise over the forecast period

COMPETITIVE LANDSCAPE

Akova Group maintains lead thanks to wide portfolio and strong distribution
Zlatiborac benefits from an expanded presence, strong innovation, and a focus on sustainability

CHANNELS

Small local grocers remains the leading channel, with supermarkets a close second
Retail e-commerce continues overall growth trend from a low base

CATEGORY DATA

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Rice, Pasta and Noodles in Bosnia and Herzegovina

KEY DATA FINDINGS

2025 DEVELOPMENTS

A stable performance due to baseline demand and high prices

INDUSTRY PERFORMANCE

Baseline demand supported by relative affordability and versatility of rice, pasta and noodles
Chilled pasta benefits from fresh and high-quality image

WHAT'S NEXT?

Ongoing positive sales thanks to essential nature of products
Health trends will inspire ongoing new product developments
Price control efforts aim to stabilise costs

COMPETITIVE LANDSCAPE

Barilla maintains lead thanks to success in pasta
Malisic shows strong growth in rice thanks to offering a variety of rice types with Malpak

CHANNELS

Supermarkets take over from small local grocers as the leading distribution channel
Retail e-commerce continues overall growth trend from a low base

CATEGORY DATA

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