



Staple Foods in North Macedonia

November 2023

Table of Contents

Staple Foods in North Macedonia

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 North Macedonia

KEY DATA FINDINGS

2023 DEVELOPMENTS

Marginal volume growth with strong value increase due to rising unit prices

Increasing popularity of packaged flat bread and frozen baked goods in 2023

Domestic manufacturers active with new product development

PROSPECTS AND OPPORTUNITIES

Population decline limits future growth potential

Convenience and new products to drive growth of frozen baked goods

Rising interest in international cuisines supports growth of flat bread

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 North Macedonia

KEY DATA FINDINGS

2023 DEVELOPMENTS

Moderate volume growth coupled with strong value growth due to rising prices

Health and wellness and convenience influence new products in 2023

Younger consumers boost demand for flakes

PROSPECTS AND OPPORTUNITIES

Breakfast cereals will continue to benefit from their perceived health benefits

E-commerce supports future growth

Consumer demand and innovation to drive growth of children's breakfast cereals

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 North Macedonia

KEY DATA FINDINGS

2023 DEVELOPMENTS

Demand supported by burgeoning health and wellness trend

Convenience is a significant growth driver

Shelf stable products continue to suffer from their unhealthy image

PROSPECTS AND OPPORTUNITIES

Positive growth of processed produce supported by rising health consciousness

Trend of juicing and smoothie making to drive growth of frozen fruit

Maturity impacts future of shelf stable beans

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

Table 38 - Sales of Processed Fruit and Vegetables by Category: % 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 North Macedonia

KEY DATA FINDINGS

2023 DEVELOPMENTS

Stable demand and strong retail value growth due to price hikes in 2023

Low sales base supports growth of frozen processed seafood

New frozen products cater to rising consumer demand for convenience

PROSPECTS AND OPPORTUNITIES

Market saturation and declining consumer base impact future growth

Expansion of product range and health and wellness trend drive growth of frozen processed seafood

Stagnant shelf stable categories as consumer preference for chilled products continues

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 North Macedonia

KEY DATA FINDINGS

2023 DEVELOPMENTS

Stable performance of rice and noodles in 2023

Rising demand and product expansion support growth of instant noodle pouches

Italian companies continue to lead pasta in 2023

PROSPECTS AND OPPORTUNITIES

Innovation and niche products to ensure further growth

Chilled pasta to see the fastest growth as consumers demand fresh products

Rising demand and availability of noodles

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-north-macedonia/report.