



Snacks in Serbia

July 2024

Table of Contents

EXECUTIVE SUMMARY

- Snacks in 2024: The big picture
- Key trends in 2024
- Competitive Landscape
- Channel developments
- What next for snacks?

MARKET DATA

- Table 1 - Sales of Snacks by Category: Volume 2019-2024
- Table 2 - Sales of Snacks by Category: Value 2019-2024
- Table 3 - Sales of Snacks by Category: % Volume Growth 2019-2024
- Table 4 - Sales of Snacks by Category: % Value Growth 2019-2024
- Table 5 - NBO Company Shares of Snacks: % Value 2020-2024
- Table 6 - LBN Brand Shares of Snacks: % Value 2021-2024
- Table 7 - Penetration of Private Label by Category: % Value 2019-2024
- Table 8 - Distribution of Snacks by Format: % Value 2019-2024
- Table 9 - Forecast Sales of Snacks by Category: Volume 2024-2029
- Table 10 - Forecast Sales of Snacks by Category: Value 2024-2029
- Table 11 - Forecast Sales of Snacks by Category: % Volume Growth 2024-2029
- Table 12 - Forecast Sales of Snacks by Category: % Value Growth 2024-2029

DISCLAIMER

SOURCES

- Summary 1 - Research Sources

Chocolate Confectionery in Serbia

KEY DATA FINDINGS

2024 DEVELOPMENTS

- Price rises boost value growth
- Increase in popularity of private label
- Mondelez to retain lead, while Nestlé targets rise in ethical consumerism

PROSPECTS AND OPPORTUNITIES

- Growth ahead despite obstacles
- Continued consumer focus on price
- Opportunities for innovation

CATEGORY DATA

- Summary 2 - Other Chocolate Confectionery by Product Type: 2024
- Table 13 - Sales of Chocolate Confectionery by Category: Volume 2019-2024
- Table 14 - Sales of Chocolate Confectionery by Category: Value 2019-2024
- Table 15 - Sales of Chocolate Confectionery by Category: % Volume Growth 2019-2024
- Table 16 - Sales of Chocolate Confectionery by Category: % Value Growth 2019-2024
- Table 17 - Sales of Chocolate Tablets by Type: % Value 2019-2024
- Table 18 - NBO Company Shares of Chocolate Confectionery: % Value 2020-2024
- Table 19 - LBN Brand Shares of Chocolate Confectionery: % Value 2021-2024
- Table 20 - Distribution of Chocolate Confectionery by Format: % Value 2019-2024
- Table 21 - Forecast Sales of Chocolate Confectionery by Category: Volume 2024-2029
- Table 22 - Forecast Sales of Chocolate Confectionery by Category: Value 2024-2029

Table 23 - Forecast Sales of Chocolate Confectionery by Category: % Volume Growth 2024-2029

Table 24 - Forecast Sales of Chocolate Confectionery by Category: % Value Growth 2024-2029

Gum in Serbia

KEY DATA FINDINGS

2024 DEVELOPMENTS

- Growth driven by chewing gum
- Wrigley faces very little competition
- Impulse character of gum supports store-based sales

PROSPECTS AND OPPORTUNITIES

- Growth set to be dampened by competition from alternatives
- Wrigley to remain dominant
- Innovation to maintain consumer interest

CATEGORY DATA

- Table 25 - Sales of Gum by Category: Volume 2019-2024
- Table 26 - Sales of Gum by Category: Value 2019-2024
- Table 27 - Sales of Gum by Category: % Volume Growth 2019-2024
- Table 28 - Sales of Gum by Category: % Value Growth 2019-2024
- Table 29 - Sales of Gum by Flavour: Rankings 2019-2024
- Table 30 - NBO Company Shares of Gum: % Value 2020-2024
- Table 31 - LBN Brand Shares of Gum: % Value 2021-2024
- Table 32 - Distribution of Gum by Format: % Value 2019-2024
- Table 33 - Forecast Sales of Gum by Category: Volume 2024-2029
- Table 34 - Forecast Sales of Gum by Category: Value 2024-2029
- Table 35 - Forecast Sales of Gum by Category: % Volume Growth 2024-2029
- Table 36 - Forecast Sales of Gum by Category: % Value Growth 2024-2029

Sugar Confectionery in Serbia

KEY DATA FINDINGS

2024 DEVELOPMENTS

- Volume sales supported by demand for affordable indulgence
- Pionir set to retain lead
- Private label has a notable presence in sugar confectionery

PROSPECTS AND OPPORTUNITIES

- Competition from rival snacks categories
- Price sensitivity to present a significant obstacle
- Innovation to stimulate consumer interest

CATEGORY DATA

- Summary 3 - Other Sugar Confectionery by Product Type: 2024
- Table 37 - Sales of Sugar Confectionery by Category: Volume 2019-2024
- Table 38 - Sales of Sugar Confectionery by Category: Value 2019-2024
- Table 39 - Sales of Sugar Confectionery by Category: % Volume Growth 2019-2024
- Table 40 - Sales of Sugar Confectionery by Category: % Value Growth 2019-2024
- Table 41 - Sales of Pastilles, Gummies, Jellies and Chews by Type: % Value 2019-2024
- Table 42 - NBO Company Shares of Sugar Confectionery: % Value 2020-2024
- Table 43 - LBN Brand Shares of Sugar Confectionery: % Value 2021-2024

Table 44 - Distribution of Sugar Confectionery by Format: % Value 2019-2024

Table 45 - Forecast Sales of Sugar Confectionery by Category: Volume 2024-2029

Table 46 - Forecast Sales of Sugar Confectionery by Category: Value 2024-2029

Table 47 - Forecast Sales of Sugar Confectionery by Category: % Volume Growth 2024-2029

Table 48 - Forecast Sales of Sugar Confectionery by Category: % Value Growth 2024-2029

Ice Cream in Serbia

KEY DATA FINDINGS

2024 DEVELOPMENTS

- Strong value growth as prices rise
- Frikom retains lead as ice cream becomes less seasonal
- Growing interest in healthier variants

PROSPECTS AND OPPORTUNITIES

- Dairy market instability to hit consumption
- Increasing price competition
- Increasing level of innovation

CATEGORY DATA

Table 49 - Sales of Ice Cream by Category: Volume 2019-2024

Table 50 - Sales of Ice Cream by Category: Value 2019-2024

Table 51 - Sales of Ice Cream by Category: % Volume Growth 2019-2024

Table 52 - Sales of Ice Cream by Category: % Value Growth 2019-2024

Table 53 - Sales of Ice Cream by Leading Flavours: Rankings 2019-2024

Table 54 - Sales of Impulse Ice Cream by Format: % Value 2019-2024

Table 55 - NBO Company Shares of Ice Cream: % Value 2020-2024

Table 56 - LBN Brand Shares of Ice Cream: % Value 2021-2024

Table 57 - NBO Company Shares of Impulse Ice Cream: % Value 2020-2024

Table 58 - LBN Brand Shares of Impulse Ice Cream: % Value 2021-2024

Table 59 - NBO Company Shares of Take-home Ice Cream: % Value 2020-2024

Table 60 - LBN Brand Shares of Take-home Ice Cream: % Value 2021-2024

Table 61 - Distribution of Ice Cream by Format: % Value 2019-2024

Table 62 - Forecast Sales of Ice Cream by Category: Volume 2024-2029

Table 63 - Forecast Sales of Ice Cream by Category: Value 2024-2029

Table 64 - Forecast Sales of Ice Cream by Category: % Volume Growth 2024-2029

Table 65 - Forecast Sales of Ice Cream by Category: % Value Growth 2024-2029

Savoury Snacks in Serbia

KEY DATA FINDINGS

2024 DEVELOPMENTS

- Strong value growth
- PepsiCo extends lead
- Focus on innovation

PROSPECTS AND OPPORTUNITIES

- Positive outlook underpinned by product innovation and marketing support
- Health and wellness to exert growing influence
- Retail modernisation augurs well for private label development

CATEGORY DATA

Summary 4 - Other Savoury Snacks by Product Type: 2024

Table 66 - Sales of Savoury Snacks by Category: Volume 2019-2024

Table 67 - Sales of Savoury Snacks by Category: Value 2019-2024

Table 68 - Sales of Savoury Snacks by Category: % Volume Growth 2019-2024

Table 69 - Sales of Savoury Snacks by Category: % Value Growth 2019-2024

Table 70 - NBO Company Shares of Savoury Snacks: % Value 2020-2024

Table 71 - LBN Brand Shares of Savoury Snacks: % Value 2021-2024

Table 72 - Distribution of Savoury Snacks by Format: % Value 2019-2024

Table 73 - Forecast Sales of Savoury Snacks by Category: Volume 2024-2029

Table 74 - Forecast Sales of Savoury Snacks by Category: Value 2024-2029

Table 75 - Forecast Sales of Savoury Snacks by Category: % Volume Growth 2024-2029

Table 76 - Forecast Sales of Savoury Snacks by Category: % Value Growth 2024-2029

Sweet Biscuits, Snack Bars and Fruit Snacks in Serbia

KEY DATA FINDINGS

2024 DEVELOPMENTS

- Price sensitivity, and health and wellness
- Rising interest in flavours and smaller packs
- Bambi Banat holds comfortable lead

PROSPECTS AND OPPORTUNITIES

- Stable volume growth expected
- Health and wellness trend to boost demand for fruit snacks and snack bars
- Sweet biscuits likely to see health orientated innovation

CATEGORY DATA

Table 77 - Sales of Sweet Biscuits, Snack Bars and Fruit Snacks by Category: Volume 2019-2024

Table 78 - Sales of Sweet Biscuits, Snack Bars and Fruit Snacks by Category: Value 2019-2024

Table 79 - Sales of Sweet Biscuits, Snack Bars and Fruit Snacks by Category: % Volume Growth 2019-2024

Table 80 - Sales of Sweet Biscuits, Snack Bars and Fruit Snacks by Category: % Value Growth 2019-2024

Table 81 - NBO Company Shares of Sweet Biscuits, Snack Bars and Fruit Snacks: % Value 2020-2024

Table 82 - LBN Brand Shares of Sweet Biscuits, Snack Bars and Fruit Snacks: % Value 2021-2024

Table 83 - NBO Company Shares of Sweet Biscuits: % Value 2020-2024

Table 84 - LBN Brand Shares of Sweet Biscuits: % Value 2021-2024

Table 85 - NBO Company Shares of Snack Bars: % Value 2020-2024

Table 86 - LBN Brand Shares of Snack Bars: % Value 2021-2024

Table 87 - NBO Company Shares of Fruit Snacks: % Value 2020-2024

Table 88 - LBN Brand Shares of Fruit Snacks: % Value 2021-2024

Table 89 - Distribution of Sweet Biscuits, Snack Bars and Fruit Snacks by Format: % Value 2019-2024

Table 90 - Distribution of Sweet Biscuits by Format: % Value 2019-2024

Table 91 - Distribution of Snack Bars by Format: % Value 2019-2024

Table 92 - Distribution of Fruit Snacks by Format: % Value 2019-2024

Table 93 - Forecast Sales of Sweet Biscuits, Snack Bars and Fruit Snacks by Category: Volume 2024-2029

Table 94 - Forecast Sales of Sweet Biscuits, Snack Bars and Fruit Snacks by Category: Value 2024-2029

Table 95 - Forecast Sales of Sweet Biscuits, Snack Bars and Fruit Snacks by Category: % Volume Growth 2024-2029

Table 96 - Forecast Sales of Sweet Biscuits, Snack Bars and Fruit Snacks by Category: % Value Growth 2024-2029

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-serbia/report.