



Euromonitor
International

Staple Foods in North Macedonia

November 2024

Table of Contents

EXECUTIVE SUMMARY

- Staple foods in 2024: The big picture
- Key trends in 2024
- Competitive Landscape
- Channel developments
- What next for staple foods?

MARKET DATA

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

DISCLAIMER

SOURCES

- Summary 1 - Research Sources

KEY DATA FINDINGS

2024 DEVELOPMENTS

- Adoption of low-carb diets continues to depress demand for leavened bread
- Frozen baked goods shows the fastest development in volume and value terms
- Domestic and regional companies launch several new products

PROSPECTS AND OPPORTUNITIES

- Sluggish demand for leavened bread will limit overall growth potential
- Convenience trend will continue to favour frozen baked goods
- Consumer interest in flat bread set to remain strong

CATEGORY DATA

- Table 13 - Sales of Baked Goods by Category: Volume 2019-2024
- Table 14 - Sales of Baked Goods by Category: Value 2019-2024
- Table 15 - Sales of Baked Goods by Category: % Volume Growth 2019-2024
- Table 16 - Sales of Baked Goods by Category: % Value Growth 2019-2024
- Table 17 - Sales of Pastries by Type: % Value 2019-2024
- Table 18 - NBO Company Shares of Baked Goods: % Value 2020-2024
- Table 19 - LBN Brand Shares of Baked Goods: % Value 2021-2024
- Table 20 - Distribution of Baked Goods by Format: % Value 2019-2024
- Table 21 - Forecast Sales of Baked Goods by Category: Volume 2024-2029
- Table 22 - Forecast Sales of Baked Goods by Category: Value 2024-2029
- Table 23 - Forecast Sales of Baked Goods by Category: % Volume Growth 2024-2029

Table 24 - Forecast Sales of Baked Goods by Category: % Value Growth 2024-2029

Breakfast Cereals in North Macedonia

KEY DATA FINDINGS

2024 DEVELOPMENTS

- Wholesome image and convenience factor underpin stable demand
- Muesli and granola continues to benefit most from healthy eating trend
- Nestlé KitKat Cereal enters children's breakfast cereals

PROSPECTS AND OPPORTUNITIES

- New launches should reinforce perceived health benefits of breakfast cereals
- Children's breakfast cereals set to grow fastest in volume terms
- Sales via the e-commerce channel expected to increase steadily

CATEGORY DATA

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

Processed Fruit and Vegetables in North Macedonia

KEY DATA FINDINGS

2024 DEVELOPMENTS

- Processed fruit and vegetables shows another solid performance in volume terms
- Frozen fruit is the most dynamic category
- Frozen processed vegetables increasingly favoured over shelf stable varieties

PROSPECTS AND OPPORTUNITIES

- Overall demand expected to remain stable
- Frozen fruit set to benefit from growing popularity of smoothies and juicing
- Health-related concerns will continue to diminish appeal of shelf stable products

CATEGORY DATA

- Table 36 - Sales of Processed Fruit and Vegetables by Category: Volume 2019-2024
- Table 37 - Sales of Processed Fruit and Vegetables by Category: Value 2019-2024
- Table 38 - Sales of Processed Fruit and Vegetables by Category: % Volume Growth 2019-2024
- Table 39 - Sales of Processed Fruit and Vegetables by Category: % Value Growth 2019-2024
- Table 40 - Sales of Frozen Processed Vegetables by Type: % Value Breakdown 2019-2024
- Table 41 - NBO Company Shares of Processed Fruit and Vegetables: % Value 2020-2024
- Table 42 - LBN Brand Shares of Processed Fruit and Vegetables: % Value 2021-2024
- Table 43 - Distribution of Processed Fruit and Vegetables by Format: % Value 2019-2024
- Table 44 - Forecast Sales of Processed Fruit and Vegetables by Category: Volume 2024-2029
- Table 45 - Forecast Sales of Processed Fruit and Vegetables by Category: Value 2024-2029

Table 46 - Forecast Sales of Processed Fruit and Vegetables by Category: % Volume Growth 2024-2029

Table 47 - Forecast Sales of Processed Fruit and Vegetables by Category: % Value Growth 2024-2029

Processed Meat, Seafood and Alternatives To Meat in North Macedonia

KEY DATA FINDINGS

2024 DEVELOPMENTS

Overall demand rises but maturity and population decline continue to temper growth
Chilled and frozen processed seafood are the best performing categories
Level of new product development activity remains high

PROSPECTS AND OPPORTUNITIES

Traditional consumption habits and convenience appeal will support steady demand
Chilled and frozen processed seafood likely to witness greater premiumisation
Shelf stable processed red meat expected to be the weakest performer

CATEGORY DATA

- Table 48 - Sales of Processed Meat, Seafood and Alternatives to Meat by Category: Volume 2019-2024
- Table 49 - Sales of Processed Meat, Seafood and Alternatives to Meat by Category: Value 2019-2024
- Table 50 - Sales of Processed Meat, Seafood and Alternatives to Meat by Category: % Volume Growth 2019-2024
- Table 51 - Sales of Processed Meat, Seafood and Alternatives to Meat by Category: % Value Growth 2019-2024
- Table 52 - Sales of Shelf Stable Processed Red Meat by Type: % Volume Breakdown 2019-2024
- Table 53 - Sales of Chilled Processed Red Meat by Type: % Volume Breakdown 2019-2024
- Table 54 - Sales of Frozen Processed Red Meat by Type: % Volume Breakdown 2019-2024
- Table 55 - Sales of Frozen Processed Poultry by Type: % Value Breakdown 2019-2024
- Table 56 - Sales of Frozen Processed Seafood by Type: % Value Breakdown 2019-2024
- Table 57 - NBO Company Shares of Processed Meat, Seafood and Alternatives to Meat: % Value 2020-2024
- Table 58 - LBN Brand Shares of Processed Meat, Seafood and Alternatives to Meat: % Value 2021-2024
- Table 59 - Distribution of Processed Meat, Seafood and Alternatives to Meat by Format: % Value 2019-2024
- Table 60 - Forecast Sales of Processed Meat, Seafood and Alternatives to Meat by Category: Volume 2024-2029
- Table 61 - Forecast Sales of Processed Meat, Seafood and Alternatives to Meat by Category: Value 2024-2029

Rice, Pasta and Noodles in North Macedonia

KEY DATA FINDINGS

2024 DEVELOPMENTS

Retail volume sales buoyed by enduring popularity of rice and dried pasta
Healthy image and convenience factor broaden appeal of chilled pasta
Instant noodles is a focal point for new product development

PROSPECTS AND OPPORTUNITIES

Overall growth prospects will remain limited due to maturity and population decline
Chilled pasta expected to be the fastest developing category
Fortunes of plain and instant noodles will continue to diverge

CATEGORY DATA

- Table 62 - Sales of Rice, Pasta and Noodles by Category: Volume 2019-2024
- Table 63 - Sales of Rice, Pasta and Noodles by Category: Value 2019-2024
- Table 64 - Sales of Rice, Pasta and Noodles by Category: % Volume Growth 2019-2024
- Table 65 - Sales of Rice, Pasta and Noodles by Category: % Value Growth 2019-2024
- Table 66 - Sales of Instant Noodles by Leading Flavours: Rankings 2019-2024
- Table 67 - NBO Company Shares of Rice, Pasta and Noodles: % Value 2020-2024

Table 68 - LBN Brand Shares of Rice, Pasta and Noodles: % Value 2021-2024

Table 69 - NBO Company Shares of Rice: % Value 2020-2024

Table 70 - LBN Brand Shares of Rice: % Value 2021-2024

Table 71 - NBO Company Shares of Pasta: % Value 2020-2024

Table 72 - LBN Brand Shares of Pasta: % Value 2021-2024

Table 73 - NBO Company Shares of Noodles: % Value 2020-2024

Table 74 - LBN Brand Shares of Noodles: % Value 2021-2024

Table 75 - Distribution of Rice, Pasta and Noodles by Format: % Value 2019-2024

Table 76 - Distribution of Rice by Format: % Value 2019-2024

Table 77 - Distribution of Pasta by Format: % Value 2019-2024

Table 78 - Distribution of Noodles by Format: % Value 2019-2024

Table 79 - Forecast Sales of Rice, Pasta and Noodles by Category: Volume 2024-2029

Table 80 - Forecast Sales of Rice, Pasta and Noodles by Category: Value 2024-2029

Table 81 - Forecast Sales of Rice, Pasta and Noodles by Category: % Volume Growth 2024-2029

Table 82 - Forecast Sales of Rice, Pasta and Noodles 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/staple-foods-in-north-macedonia/report.