



Staple Foods in the Czech Republic

November 2025

Table of Contents

Staple Foods in the Czech Republic

EXECUTIVE SUMMARY

Premiumisation, innovation and health trends shape growth in staple foods

KEY DATA FINDINGS

INDUSTRY PERFORMANCE

Value growth is driven by higher prices and an ongoing reliance on promotions

Rising health awareness drives demand for cleaner and higher-protein staple foods

Sustainability and convenience trends reshape staple food production and consumption

WHAT'S NEXT?

Premiumisation and innovation are set to drive steady value growth in staple foods

Convenient, healthier and free-from options are set to influence product innovation

Retail e-commerce is set to gain share as subscription models and bundled promotions increase

COMPETITIVE LANDSCAPE

Penam maintains its leadership in Czech staple foods despite a modest share decline

Lidl Ceska republika drives private label growth and reshapes competition in staple foods

CHANNELS

Hypermarkets remains the leading channel for staple foods despite a slight share decline

Discounters and retail e-commerce drive dynamic shifts in staple food distribution

MARKET DATA

Table 1 - Sales of Staple Foods by Category: Volume 2020-2025

Table 2 - Sales of Staple Foods by Category: Value 2020-2025

Table 3 - Sales of Staple Foods by Category: % Volume Growth 2020-2025

Table 4 - Sales of Staple Foods by Category: % Value Growth 2020-2025

Table 5 - NBO Company Shares of Staple Foods: % Value 2021-2025

Table 6 - LBN Brand Shares of Staple Foods: % Value 2022-2025

Table 7 - Penetration of Private Label by Category: % Value 2020-2025

Table 8 - Distribution of Staple Foods by Format: % Value 2020-2025

Table 9 - Forecast Sales of Staple Foods by Category: Volume 2025-2030

Table 10 - Forecast Sales of Staple Foods by Category: Value 2025-2030

Table 11 - Forecast Sales of Staple Foods by Category: % Volume Growth 2025-2030

Table 12 - Forecast Sales of Staple Foods by Category: % Value Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

SOURCES

Summary 1 - Research Sources

Baked Goods in the Czech Republic

KEY DATA FINDINGS

2025 DEVELOPMENTS

Baked goods grows as consumers favour premium, healthier, and convenient options

INDUSTRY PERFORMANCE

Baked goods value sales grow as Czech consumers shift towards quality and premium options

Pastries lead baked goods growth driven by premiumisation and artisanal trends

WHAT'S NEXT

Baked goods sales are set to grow in value despite stagnant volume

Health-focused innovation will drive growth in wholegrain, functional, and gluten-free baked goods

Sustainability in baked goods is set to focus on waste reduction, packaging, and energy-efficient production

COMPETITIVE LANDSCAPE

Penam s.r.o. leads baked goods through strong brands and extensive distribution

Billa sro drives dynamic growth in Czech baked goods through its private label ranges

CHANNELS

Hypermarkets lead baked goods distribution despite share erosion

Food/drink/tobacco specialists drive growth through offering premium goods

CATEGORY DATA

Table 13 - Sales of Baked Goods by Category: Volume 2020-2025

Table 14 - Sales of Baked Goods by Category: Value 2020-2025

Table 15 - Sales of Baked Goods by Category: % Volume Growth 2020-2025

Table 16 - Sales of Baked Goods by Category: % Value Growth 2020-2025

Table 17 - Sales of Pastries by Type: % Value 2020-2025

Table 18 - NBO Company Shares of Baked Goods: % Value 2021-2025

Table 19 - LBN Brand Shares of Baked Goods: % Value 2022-2025

Table 20 - Distribution of Baked Goods by Format: % Value 2020-2025

Table 21 - Forecast Sales of Baked Goods by Category: Volume 2025-2030

Table 22 - Forecast Sales of Baked Goods by Category: Value 2025-2030

Table 23 - Forecast Sales of Baked Goods by Category: % Volume Growth 2025-2030

Table 24 - Forecast Sales of Baked Goods by Category: % Value Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

[Breakfast Cereals in the Czech Republic](#)

KEY DATA FINDINGS

2025 DEVELOPMENTS

Value growth for breakfast cereals is driven by health trends and pack size preferences

INDUSTRY PERFORMANCE

Value sales of breakfast cereals rise as consumer confidence recovers in 2025

Health-focused muesli and granola lead value growth as consumers appreciate healthier options

WHAT'S NEXT?

Convenience, health, and premiumisation are expected to drive breakfast cereals sales

Health and wellness trends are set to drive growth in clean-label, reduced-sugar, and functional breakfast cereals

Sustainability and local sourcing will shape breakfast cereals, with organic labels driving consumer trust

COMPETITIVE LANDSCAPE

Emco spol sro leads breakfast cereal as natural and clean label offerings drive brand strength

Orbico sro leads growth through international brands and innovative, premium offerings

CHANNELS

Hypermarkets lead distribution of breakfast cereals, driven by promotions and competitive pricing

Discounters gain ground in breakfast cereals through competitive pricing and expanded convenience

CATEGORY DATA

Table 25 - Sales of Breakfast Cereals by Category: Volume 2020-2025

Table 26 - Sales of Breakfast Cereals by Category: Value 2020-2025
Table 27 - Sales of Breakfast Cereals by Category: % Volume Growth 2020-2025
Table 28 - Sales of Breakfast Cereals by Category: % Value Growth 2020-2025
Table 29 - NBO Company Shares of Breakfast Cereals: % Value 2021-2025
Table 30 - LBN Brand Shares of Breakfast Cereals: % Value 2022-2025
Table 31 - Distribution of Breakfast Cereals by Format: % Value 2020-2025
Table 32 - Forecast Sales of Breakfast Cereals by Category: Volume 2025-2030
Table 33 - Forecast Sales of Breakfast Cereals by Category: Value 2025-2030
Table 34 - Forecast Sales of Breakfast Cereals by Category: % Volume Growth 2025-2030
Table 35 - Forecast Sales of Breakfast Cereals by Category: % Value Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

[Processed Fruit and Vegetables in the Czech Republic](#)

KEY DATA FINDINGS

2025 DEVELOPMENTS

Premiumisation, convenience and frozen products drive growth in 2025

INDUSTRY PERFORMANCE

Processed fruit and vegetables see value growth driven by premiumisation and convenience
Frozen processed fruit and vegetables lead growth, driven by convenience, versatility, and innovation

WHAT'S NEXT?

Growth is set to be driven by convenience and premiumisation amid economic recovery
Health and wellness trends are set to increasingly influence innovation in processed fruit and vegetables
Sustainability will drive innovation and consumer trust through packaging and sourcing

COMPETITIVE LANDSCAPE

Bonduelle spol sro maintains its leading position, despite a slight decline in share
Growth of private label accelerates amid inflation and changing consumer preferences

CHANNELS

Hypermarkets retains its leadership in processed fruit and vegetables distribution
Retail e-commerce gains ground as consumers appreciate convenience and a wide ranges of goods

CATEGORY DATA

Table 36 - Sales of Processed Fruit and Vegetables by Category: Volume 2020-2025
Table 37 - Sales of Processed Fruit and Vegetables by Category: Value 2020-2025
Table 38 - Sales of Processed Fruit and Vegetables by Category: % Volume Growth 2020-2025
Table 39 - Sales of Processed Fruit and Vegetables by Category: % Value Growth 2020-2025
Table 40 - Sales of Frozen Processed Vegetables by Type: % Value Breakdown 2020-2025
Table 41 - NBO Company Shares of Processed Fruit and Vegetables: % Value 2021-2025
Table 42 - LBN Brand Shares of Processed Fruit and Vegetables: % Value 2022-2025
Table 43 - Distribution of Processed Fruit and Vegetables by Format: % Value 2020-2025
Table 44 - Forecast Sales of Processed Fruit and Vegetables by Category: Volume 2025-2030
Table 45 - Forecast Sales of Processed Fruit and Vegetables by Category: Value 2025-2030
Table 46 - Forecast Sales of Processed Fruit and Vegetables by Category: % Volume Growth 2025-2030
Table 47 - Forecast Sales of Processed Fruit and Vegetables by Category: % Value Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

[Processed Meat, Seafood and Alternatives To Meat in the Czech Republic](#)

KEY DATA FINDINGS

2025 DEVELOPMENTS

Value growth is driven by price rises, convenience trends and the strength of private label

INDUSTRY PERFORMANCE

Processed meat and seafood sales rise amid higher prices and reduced imports from Slovakia

Meat and seafood substitutes remains the fastest-growing category despite slowdown

WHAT'S NEXT?

Rising incomes is set to boost demand for meat, seafood and alternatives to meat

Health and sustainability trends will fuel demand for meat and seafood substitutes

Sustainability is expected to drive innovation in meat and seafood, from eco-packaging to ethical sourcing

COMPETITIVE LANDSCAPE

Lidl Ceska republika leads processed meat, seafood and alternatives to meat through strong private label ranges

Private label drives the fastest growth as Czech consumers prioritise value

CHANNELS

Hypermarkets lead sales while retail e-commerce and discounters gain ground

Discounters is the fastest-growing channel, driven by price, convenience and private label quality

CATEGORY DATA

Table 48 - Sales of Processed Meat, Seafood and Alternatives to Meat by Category: Volume 2020-2025

Table 49 - Sales of Processed Meat, Seafood and Alternatives to Meat by Category: Value 2020-2025

Table 50 - Sales of Processed Meat, Seafood and Alternatives to Meat by Category: % Volume Growth 2020-2025

Table 51 - Sales of Processed Meat, Seafood and Alternatives to Meat by Category: % Value Growth 2020-2025

Table 52 - Sales of Shelf Stable Processed Red Meat by Type: % Volume Breakdown 2020-2025

Table 53 - Sales of Chilled Processed Red Meat by Type: % Volume Breakdown 2020-2025

Table 54 - Sales of Frozen Processed Red Meat by Type: % Volume Breakdown 2020-2025

Table 55 - Sales of Frozen Processed Poultry by Type: % Value Breakdown 2020-2025

Table 56 - Sales of Frozen Processed Seafood by Type: % Value Breakdown 2020-2025

Table 57 - NBO Company Shares of Processed Meat, Seafood and Alternatives to Meat: % Value 2021-2025

Table 58 - LBN Brand Shares of Processed Meat, Seafood and Alternatives to Meat: % Value 2022-2025

Table 59 - Distribution of Processed Meat, Seafood and Alternatives to Meat by Format: % Value 2020-2025

Table 60 - Forecast Sales of Processed Meat, Seafood and Alternatives to Meat by Category: Volume 2025-2030

Table 61 - Forecast Sales of Processed Meat, Seafood and Alternatives to Meat by Category: Value 2025-2030

COUNTRY REPORTS DISCLAIMER

[Rice, Pasta and Noodles in the Czech Republic](#)

KEY DATA FINDINGS

2025 DEVELOPMENTS

Price increases and premiumisation drive the performance of rice, pasta and noodles

INDUSTRY PERFORMANCE

Modest value growth is driven by prices rises and premiumisation

Noodles, particularly instant varieties, drive growth as consumers seek convenience

WHAT'S NEXT?

Convenience and Asian-style cuisine is set to drive future growth in rice, pasta, and noodles

Rising focus on nutrition is expected to drive growth in wholegrain and high-protein options

Sustainability and eco-conscious packaging is set to shape product innovation

COMPETITIVE LANDSCAPE

Orkla Foods maintains its leadership through strong brand names and solid distribution
Nongshim drives growth through rapid expansion in instant noodles and strong flavour innovation

CHANNELS

Hypermarkets lead in rice, pasta and noodles despite gradual share erosion to smaller formats
Discounters gain momentum as some consumers favour convenience and value over large-scale hypermarket shopping

CATEGORY DATA

Table 62 - Sales of Rice, Pasta and Noodles by Category: Volume 2020-2025
Table 63 - Sales of Rice, Pasta and Noodles by Category: Value 2020-2025
Table 64 - Sales of Rice, Pasta and Noodles by Category: % Volume Growth 2020-2025
Table 65 - Sales of Rice, Pasta and Noodles by Category: % Value Growth 2020-2025
Table 66 - Sales of Instant Noodles by Leading Flavours: Rankings 2020-2025
Table 67 - NBO Company Shares of Rice, Pasta and Noodles: % Value 2021-2025
Table 68 - LBN Brand Shares of Rice, Pasta and Noodles: % Value 2022-2025
Table 69 - NBO Company Shares of Rice: % Value 2021-2025
Table 70 - LBN Brand Shares of Rice: % Value 2022-2025
Table 71 - NBO Company Shares of Pasta: % Value 2021-2025
Table 72 - LBN Brand Shares of Pasta: % Value 2022-2025
Table 73 - NBO Company Shares of Noodles: % Value 2021-2025
Table 74 - LBN Brand Shares of Noodles: % Value 2022-2025
Table 75 - Distribution of Rice, Pasta and Noodles by Format: % Value 2020-2025
Table 76 - Distribution of Rice by Format: % Value 2020-2025
Table 77 - Distribution of Pasta by Format: % Value 2020-2025
Table 78 - Distribution of Noodles by Format: % Value 2020-2025
Table 79 - Forecast Sales of Rice, Pasta and Noodles by Category: Volume 2025-2030
Table 80 - Forecast Sales of Rice, Pasta and Noodles by Category: Value 2025-2030
Table 81 - Forecast Sales of Rice, Pasta and Noodles by Category: % Volume Growth 2025-2030
Table 82 - Forecast Sales of Rice, Pasta and Noodles by Category: % Value Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

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-the-czech-republic/report.