



Processed Meat, Seafood and Alternatives To Meat in the Czech Republic

November 2025

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

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Staple Foods in the Czech Republic - Industry Overview

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

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