



Euromonitor  
International

# Staple Foods in Bosnia and Herzegovina

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Table of Contents

## Staple Foods in Bosnia and Herzegovina

### EXECUTIVE SUMMARY

Positive sales continue, with value supported by high prices and volume meeting baseline demand

### KEY DATA FINDINGS

### INDUSTRY PERFORMANCE

Essential nature of products in staple foods supports ongoing demand

Health and wellness trends continue to influence product innovations and purchasing behaviours

Various sustainability trends noted in staple foods

### WHAT'S NEXT?

Ongoing positive sales supported by baseline demand and elevated prices

A dual focus on health and wellness and cost efficiency expected

Costs remain under pressure and government price controls remain

### COMPETITIVE LANDSCAPE

Artisanal producers lead staple foods, thanks to cultural relevance of fresh bread and pastries

Zlatiborac shows strongest growth thanks to premium processed meat and innovative packaging solutions

### CHANNELS

Small local grocers remains the leading channel, albeit with supermarkets in hot pursuit

Retail e-commerce sees strong growth from a low base

### 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 2021-2025

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 Bosnia and Herzegovina

### KEY DATA FINDINGS

### 2025 DEVELOPMENTS

Bakes goods sees stable value growth due to inflated prices, while volume remains low

### INDUSTRY PERFORMANCE

Price control measures squeeze profit margins on baked goods

Unpackaged pastries benefit from traditional, cultural relevance

## WHAT'S NEXT?

Stable growth for baked goods thanks to baseline demand and frequent new product launches to sustain consumer interest

Health and wellness trends will influence new product developments

Sustainability trends gain momentum as waste reduction and energy efficiency drive change

## COMPETITIVE LANDSCAPE

Artisanal continues to dominate unpackaged products and overall lead

Gusto E Sapore sees strongest growth thanks to steady gains in packaged cakes

## CHANNELS

Specialists continue to lead distribution of baked goods, due to widespread availability and popularity of local bakeries

Retail e-commerce continues overall growth trend from a low base

## 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 Bosnia and Herzegovina](#)

## KEY DATA FINDINGS

### 2025 DEVELOPMENTS

Positive sales continue, with low and stable volume and high prices supporting value growth

## INDUSTRY PERFORMANCE

Baseline demand continues despite high prices, with health and wellness trends playing a part

Hot cereals benefits from wholesome image and convenience

## WHAT'S NEXT?

Ongoing positive sales supported by healthy options in breakfast cereals alongside high prices

Health and wellness trends will be key in new product developments

Sustainability gains importance as packaging policies lead the way

## COMPETITIVE LANDSCAPE

Nestlé maintains leadership thanks to strong brand image, robust distribution network, and health and wellness innovations

Viola brand benefits from focus on healthy muesli and granola

## CHANNELS

Small local grocers remains the leading channel, with supermarkets in hot pursuit

Retail e-commerce continues overall growth trend from a low base

## 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 Bosnia and Herzegovina

## KEY DATA FINDINGS

### 2025 DEVELOPMENTS

Baseline demand maintains low volume growth, while high prices support value growth

### INDUSTRY PERFORMANCE

Processed options benefit from being more affordable than fresh alternatives

Frozen processed fruit and vegetables align with healthy eating trends

### WHAT'S NEXT?

Ongoing positive sales supported by baseline demand and high prices

Health and wellness trends will support sales and inspire new product innovations

Online expansion and sustainable packaging initiatives are supporting developments in processed fruit and vegetables

### COMPETITIVE LANDSCAPE

Ledo maintains lead thanks to strong positioning in frozen fruit

McCain Foods benefits from its strength in frozen processed potatoes

### CHANNELS

Small local grocers remains the leading channel, with supermarkets a close second

Retail e-commerce continues overall growth trend from a low base

### 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 Bosnia and Herzegovina

## KEY DATA FINDINGS

### 2025 DEVELOPMENTS

A fairly stable performance with baseline demand supporting low volume and high prices supporting stronger value growth

### INDUSTRY PERFORMANCE

Value growth supported by inflation pushing up the price of meat

Frozen processed seafood benefits from affordability and convenience

### WHAT'S NEXT?

Positive sales will continue, with convenience expected to remain a key sales driver

Health and wellness trends inspire high-protein options

Potential for prices to stabilise over the forecast period

### COMPETITIVE LANDSCAPE

Akova Group maintains lead thanks to wide portfolio and strong distribution

Zlatiborac benefits from an expanded presence, strong innovation, and a focus on sustainability

### CHANNELS

Small local grocers remains the leading channel, with supermarkets a close second

Retail e-commerce continues overall growth trend from a low base

### 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 Bosnia and Herzegovina](#)

## KEY DATA FINDINGS

### 2025 DEVELOPMENTS

A stable performance due to baseline demand and high prices

### INDUSTRY PERFORMANCE

Baseline demand supported by relative affordability and versatility of rice, pasta and noodles

Chilled pasta benefits from fresh and high-quality image

### WHAT'S NEXT?

Ongoing positive sales thanks to essential nature of products

Health trends will inspire ongoing new product developments

Price control efforts aim to stabilise costs

## COMPETITIVE LANDSCAPE

Barilla maintains lead thanks to success in pasta

Malisic shows strong growth in rice thanks to offering a variety of rice types with Malpak

## CHANNELS

Supermarkets take over from small local grocers as the leading distribution channel

Retail e-commerce continues overall growth trend from a low base

## 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

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For more information on this report, further enquiries can be directed via this link [www.euromonitor.com/staple-foods-in-bosnia-and-herzegovina/report](https://www.euromonitor.com/staple-foods-in-bosnia-and-herzegovina/report).