



Rice, Pasta and Noodles in Serbia

November 2025

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2025 DEVELOPMENTS

Affordability and versatility supports steady demand

INDUSTRY PERFORMANCE

Steady demand, despite rising prices

Chilled pasta leads growth as consumers demand greater convenience

WHAT'S NEXT?

Convenience and established cooking habits to drive growth

Health and wellness trend to drive innovation in pasta, while new packaging formats will offer greater convenience in noodles

Government controls set to moderate prices

COMPETITIVE LANDSCAPE

Danubius retains leadership

Nestlé gains strength in noodles while private label gains momentum

CHANNELS

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E-commerce continues to see rapid development

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Staple Foods in Serbia - Industry Overview

EXECUTIVE SUMMARY

Busy lifestyles drive demand, but consumers remain price sensitive

KEY DATA FINDINGS

INDUSTRY PERFORMANCE

Increasingly busy lifestyles drive sales

Shift towards healthier offerings, especially in breakfast cereals

Consumers remain price sensitive

WHAT'S NEXT?

Fast-paced lifestyles to drive continued growth

Health and wellness trend will gain traction

Price sensitivity will continue to shape consumer behaviour

COMPETITIVE LANDSCAPE

Artisanal producers lead sales

Benlian leads growth having tapped into health and wellness trend

Private label solidifies its presence amid ongoing consumer price sensitivity

CHANNELS

Supermarkets strengthens lead as primary channel

E-commerce continues to see rapid growth

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