



Staple Foods in North Macedonia

March 2026

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Staple Foods in North Macedonia

EXECUTIVE SUMMARY

Overall demand picks up but population decline continues to limit growth

KEY DATA FINDINGS

INDUSTRY PERFORMANCE

Purchasing decisions and innovation increasingly influenced by health concerns

“Macedonian Best” campaign showcases local products

WHAT'S NEXT

Traditional consumption habits will continue to mitigate demographic challenges

Limited volume growth prospects expected to reinforce premiumisation

COMPETITIVE LANDSCAPE

Pekabesko remains the overall leader in staple foods

Dardanel Greece SA is the most dynamic company in value growth terms

CHANNELS

Small local grocers still the top distribution channel

E-commerce is the best performing channel

Falling inflation and rising tourism flows boost foodservice volume sales

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Baked Goods in North Macedonia

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Current value growth slows as retail volume sales rebound

INDUSTRY PERFORMANCE

Expanding offer of healthier options boosts leavened bread consumption

Frozen baked goods shows fastest growth in volume and value terms

WHAT'S NEXT

Overall demand expected to remain buoyant
Healthier alternatives set to become more popular and widely available
Flat bread poised to gain further ground at expense of leavened varieties

COMPETITIVE LANDSCAPE

Artisanal producers continue to dominate baked goods
Kuchenmeister GmbH is the most dynamic performer in value growth terms

CHANNELS

Distribution concentrated in small local grocers and food/drink/tobacco specialists
E-commerce is the best performing channel

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[Breakfast Cereals in North Macedonia](#)

KEY DATA FINDINGS

2025 DEVELOPMENTS

Convenience factor and high levels of innovation continue to boost demand

INDUSTRY PERFORMANCE

Hot cereals still the biggest category in retail volume terms
Muesli and granola is the most dynamic performer

WHAT'S NEXT

Retail volume and current value sales expected to increase steadily
Children's breakfast cereals set to be the fastest growing category
Healthier options will feature prominently among new launches

COMPETITIVE LANDSCAPE

Cereal Partners Worldwide retains clear lead
Makprogres posts fastest growth as domestic firms continue to gain ground

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Small local grocers remains the dominant distribution channel
E-commerce sales continue to rise rapidly

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[Processed Fruit and Vegetables in North Macedonia](#)

KEY DATA FINDINGS

2025 DEVELOPMENTS

Sales continue to increase steadily in volume and value terms

INDUSTRY PERFORMANCE

Frozen fruit remains the star performer

Shelf stable vegetables continue to lose ground to frozen varieties

WHAT'S NEXT

Processed fruit and vegetables retains solid growth prospects

Outlook is brightest for frozen processed vegetables

Rising health-consciousness will continue to erode appeal of shelf stable items

COMPETITIVE LANDSCAPE

Cermat, Bonum and Vipro Gevgelija remain the top three players

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CHANNELS

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E-commerce is the fastest developing channel

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[Processed Meat, Seafood and Alternatives To Meat in North Macedonia](#)

KEY DATA FINDINGS

2025 DEVELOPMENTS

Overall demand remains stable

INDUSTRY PERFORMANCE

Chilled processed seafood is the best performing category

Health concerns limit appeal of shelf stable products

WHAT'S NEXT

Desire for convenience will remain a core demand driver

Premiumisation trend likely to gain momentum

Interest in meat and seafood substitutes set to rise

COMPETITIVE LANDSCAPE

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CHANNELS

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E-commerce shows the fastest development

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[Rice, Pasta and Noodles in North Macedonia](#)

KEY DATA FINDINGS

2025 DEVELOPMENTS

Deeply ingrained consumption habits underpin stable demand

INDUSTRY PERFORMANCE

Chilled pasta remains the most dynamic category

Retail volume sales of plain noodles continue to fall

WHAT'S NEXT

Overall demand set to remain steady

Instant noodles will retain strong convenience appeal among younger demographics

Healthy eating trend will continue to shape new product development activity

COMPETITIVE LANDSCAPE

Makprogres remains the overall leader due to its strength in rice
Zito Polog ad posts fastest value growth rate

CHANNELS

Small local grocers channel continues to dominate distribution landscape
E-commerce remains the fastest growing channel

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