



Staple Foods in Slovenia

November 2025

Table of Contents

Staple Foods in Slovenia

EXECUTIVE SUMMARY

Stable goods shows resilience despite consumer price consciousness

KEY DATA FINDINGS

INDUSTRY PERFORMANCE

Staple foods shows continued growth in 2025

Private label continues to gain ground

Shift towards local sourcing amid sustainability concerns

WHAT'S NEXT?

Premiumisation to drive gradual growth but consumers will remain price sensitive

Lifestyle trends will shape future strategies

Distribution channels will continue to evolve

COMPETITIVE LANDSCAPE

KRAS maintains leadership through heritage and innovation

Don Don leads growth through innovation, brand diversification, and regional expansion

CHANNELS

Supermarkets and hypermarkets face growing pressure from discounters

E-commerce continues to gain traction

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 Slovenia

KEY DATA FINDINGS

2025 DEVELOPMENTS

Innovation is central to growth

INDUSTRY PERFORMANCE

Focus on premium, nutritious, and locally-sourced goods

Frozen baked goods leads growth

WHAT'S NEXT?

Innovation will drive steady growth

Health and wellness to shape future of baked goods

Sustainability trend will grow in prominence

COMPETITIVE LANDSCAPE

Žito leads baked goods, while private label continues to gain ground

Don Don drives growth through brand strength and strategic investment

CHANNELS

Supermarkets retains its lead

E-commerce gains traction

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 Slovenia](#)

KEY DATA FINDINGS

2025 DEVELOPMENTS

Breakfast cereals shows continued resilience, supported by nutritional innovation, versatility, and broad retail presence

INDUSTRY PERFORMANCE

Health-focused innovation drives growth

Muesli and granola leads growth

WHAT'S NEXT?

Versatility and central role in local diets will support steady growth

Health and wellness considerations will drive product innovation

Ethical awareness to fuel new offerings

COMPETITIVE LANDSCAPE

Nestlé doo maintains its leadership amid aggressive competition from private label

Sante exhibits strongest growth, albeit from low base

CHANNELS

Supermarkets remains leading channel

Non-grocery retail shows rapid expansion

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 Slovenia](#)

KEY DATA FINDINGS

2025 DEVELOPMENTS

Premium, health-focused and sustainable products drive growth

INDUSTRY PERFORMANCE

Steady expansion, driven by convenience and everyday cooking needs

Shelf stable tomatoes leads growth

WHAT'S NEXT?

Premiumisation will support value growth amid steady demand

Health-driven formulations will gain momentum

Movement towards a greener, more self-sufficient supply chain

COMPETITIVE LANDSCAPE

ETA Kamnik leads sales, thanks to strong heritage and broad product range

Private label leads expansion

CHANNELS

Hypermarkets and supermarkets lead sales

E-commerce continues to gain ground

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 Slovenia](#)

KEY DATA FINDINGS

2025 DEVELOPMENTS

Health and wellness-focused innovation drives growth

INDUSTRY PERFORMANCE

Steady expansion in 2025

Plant-based substitutes lead growth

WHAT'S NEXT?

Steady growth anticipated

Health and wellness trends will drive innovation

Sustainability will be key industry focus

COMPETITIVE LANDSCAPE

KRAS retains its dominance

Bolton Trading benefits from increased focus on sustainable sourcing

CHANNELS

Supermarkets and hypermarkets dominate sales

E-commerce leads growth as distribution landscape becomes increasingly diversified

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 Slovenia](#)

KEY DATA FINDINGS

2025 DEVELOPMENTS

Pasta remains key growth driver

INDUSTRY PERFORMANCE

Steady flow of innovation and private label expansion fuel pasta sales

Noodles leads growth

WHAT'S NEXT?

Steady growth ahead, driven by health, convenience, and private label

Health and wellness trends will bring momentum to mature category

Further growth for e-commerce as cyber security improves

COMPETITIVE LANDSCAPE

Barilla Adriatik leads rice, pasta, and noodles, followed by strong local competitors
Maggi leads growth as instant noodles gain traction

CHANNELS

Hypermarkets retain their appeal
E-commerce continues to gain traction

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-slovenia/report.