

# Staple Foods in the Czech Republic

November 2023

Table of Contents

## Staple Foods in the Czech Republic

### EXECUTIVE SUMMARY

Staple foods in 2023: The big picture

Key trends in 2023

Competitive landscape

Channel developments

What next for staple foods?

### MARKET DATA

Table 1 - Sales of Staple Foods by Category: Volume 2018-2023

Table 2 - Sales of Staple Foods by Category: Value 2018-2023

Table 3 - Sales of Staple Foods by Category: % Volume Growth 2018-2023

Table 4 - Sales of Staple Foods by Category: % Value Growth 2018-2023

Table 5 - NBO Company Shares of Staple Foods: % Value 2019-2023

Table 6 - LBN Brand Shares of Staple Foods: % Value 2020-2023

Table 7 - Penetration of Private Label by Category: % Value 2018-2023

Table 8 - Distribution of Staple Foods by Format: % Value 2018-2023

Table 9 - Forecast Sales of Staple Foods by Category: Volume 2023-2028

Table 10 - Forecast Sales of Staple Foods by Category: Value 2023-2028

Table 11 - Forecast Sales of Staple Foods by Category: % Volume Growth 2023-2028

Table 12 - Forecast Sales of Staple Foods by Category: % Value Growth 2023-2028

### DISCLAIMER

### SOURCES

Summary 1 - Research Sources

## Baked Goods in the Czech Republic

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Trend towards unpackaged and smaller-sized baked goods as consumers rationalise their spending

Packaged flat bread benefits from interest in international cuisine

Health and wellness trend exerts a growing influence on new product development

#### PROSPECTS AND OPPORTUNITIES

Trend towards higher-quality, healthier items, despite high cost of living

Trend towards snacking offers potential for pastries

Sourdough and organic varieties to grow in popularity

### CATEGORY DATA

Table 13 - Sales of Baked Goods by Category: Volume 2018-2023

Table 14 - Sales of Baked Goods by Category: Value 2018-2023

Table 15 - Sales of Baked Goods by Category: % Volume Growth 2018-2023

Table 16 - Sales of Baked Goods by Category: % Value Growth 2018-2023

Table 17 - Sales of Pastries by Type: % Value 2018-2023

Table 18 - NBO Company Shares of Baked Goods: % Value 2019-2023

Table 19 - LBN Brand Shares of Baked Goods: % Value 2020-2023

Table 20 - Distribution of Baked Goods by Format: % Value 2018-2023

Table 21 - Forecast Sales of Baked Goods by Category: Volume 2023-2028

Table 22 - Forecast Sales of Baked Goods by Category: Value 2023-2028

Table 23 - Forecast Sales of Baked Goods by Category: % Volume Growth 2023-2028

Table 24 - Forecast Sales of Baked Goods by Category: % Value Growth 2023-2028

## Breakfast Cereals in the Czech Republic

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Cost of living crisis impacts demand for breakfast cereals, as consumers seek out more economical options

Health and wellness trend continues to grow

Trend towards more frequent snacking

#### PROSPECTS AND OPPORTUNITIES

Health and wellness will continue as key driving force within breakfast cereals

Fortified products will pick up steam, in line with increasing disposable incomes

E-commerce will grow in importance

#### CATEGORY DATA

Table 25 - Sales of Breakfast Cereals by Category: Volume 2018-2023

Table 26 - Sales of Breakfast Cereals by Category: Value 2018-2023

Table 27 - Sales of Breakfast Cereals by Category: % Volume Growth 2018-2023

Table 28 - Sales of Breakfast Cereals by Category: % Value Growth 2018-2023

Table 29 - NBO Company Shares of Breakfast Cereals: % Value 2019-2023

Table 30 - LBN Brand Shares of Breakfast Cereals: % Value 2020-2023

Table 31 - Distribution of Breakfast Cereals by Format: % Value 2018-2023

Table 32 - Forecast Sales of Breakfast Cereals by Category: Volume 2023-2028

Table 33 - Forecast Sales of Breakfast Cereals by Category: Value 2023-2028

Table 34 - Forecast Sales of Breakfast Cereals by Category: % Volume Growth 2023-2028

Table 35 - Forecast Sales of Breakfast Cereals by Category: % Value Growth 2023-2028

## Processed Fruit and Vegetables in the Czech Republic

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Continued decline in consumer demand in 2023, although foodservice volumes continue to rise

Bonduelle leads amid growing competition from private label

Wider use of promotions and discounts

#### PROSPECTS AND OPPORTUNITIES

Health and wellness trend will gather pace, as price becomes a less important factor in purchasing decisions

Greater expected demand for more sustainable packaging

E-commerce will grow in importance

#### CATEGORY DATA

Table 36 - Sales of Processed Fruit and Vegetables by Category: Volume 2018-2023

Table 37 - Sales of Processed Fruit and Vegetables by Category: Value 2018-2023

Table 38 - Sales of Processed Fruit and Vegetables by Category: % Volume Growth 2018-2023

Table 39 - Sales of Processed Fruit and Vegetables by Category: % Value Growth 2018-2023

Table 40 - Sales of Frozen Processed Vegetables by Type: % Value Breakdown 2018-2023

Table 41 - NBO Company Shares of Processed Fruit and Vegetables: % Value 2019-2023

Table 42 - LBN Brand Shares of Processed Fruit and Vegetables: % Value 2020-2023

Table 43 - Distribution of Processed Fruit and Vegetables by Format: % Value 2018-2023

Table 44 - Forecast Sales of Processed Fruit and Vegetables by Category: Volume 2023-2028

Table 45 - Forecast Sales of Processed Fruit and Vegetables by Category: Value 2023-2028

Table 46 - Forecast Sales of Processed Fruit and Vegetables by Category: % Volume Growth 2023-2028

Table 47 - Forecast Sales of Processed Fruit and Vegetables by Category: % Value Growth 2023-2028

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

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Decline in meat consumption and lower profit margins present challenges for producers

Chilled meat and seafood alternatives lead growth

Consumers look to economise through packaging choices

#### PROSPECTS AND OPPORTUNITIES

Manufacturers will attempt to add value by pushing more convenient, pre-sliced products

Potential for development of meat and seafood substitutes and tofu thanks to rising adoption of plant-based diets

Ready-prepared barbecue meats could provide boost to sales

#### CATEGORY DATA

Table 48 - Sales of Processed Meat, Seafood and Alternatives to Meat by Category: Volume 2018-2023

Table 49 - Sales of Processed Meat, Seafood and Alternatives to Meat by Category: Value 2018-2023

Table 50 - Sales of Processed Meat, Seafood and Alternatives to Meat by Category: % Volume Growth 2018-2023

Table 51 - Sales of Processed Meat, Seafood and Alternatives to Meat by Category: % Value Growth 2018-2023

Table 52 - Sales of Shelf Stable Processed Red Meat by Type: % Volume Breakdown 2018-2023

Table 53 - Sales of Chilled Processed Red Meat by Type: % Volume Breakdown 2018-2023

Table 54 - Sales of Frozen Processed Red Meat by Type: % Volume Breakdown 2018-2023

Table 55 - Sales of Frozen Processed Poultry by Type: % Value Breakdown 2018-2023

Table 56 - Sales of Frozen Processed Seafood by Type: % Value Breakdown 2018-2023

Table 57 - NBO Company Shares of Processed Meat, Seafood and Alternatives to Meat: % Value 2019-2023

Table 58 - LBN Brand Shares of Processed Meat, Seafood and Alternatives to Meat: % Value 2020-2023

Table 59 - Distribution of Processed Meat, Seafood and Alternatives to Meat by Format: % Value 2018-2023

Table 60 - Forecast Sales of Processed Meat, Seafood and Alternatives to Meat by Category: Volume 2023-2028

Table 61 - Forecast Sales of Processed Meat, Seafood and Alternatives to Meat by Category: Value 2023-2028

## Rice, Pasta and Noodles in the Czech Republic

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Instant noodle pouches enjoy increased popularity amid overall decline in demand

Private labels continue to gain traction

Value-for-money packaging solutions appeal to cost-conscious consumers

#### PROSPECTS AND OPPORTUNITIES

Growing taste for Asian flavours will fuel innovation

Quick-cook pasta and packaging-free products appeal to consumers looking to reduce their carbon footprint

Legume flour-based pasta will appeal to health conscious consumers

#### CATEGORY DATA

Table 62 - Sales of Rice, Pasta and Noodles by Category: Volume 2018-2023

Table 63 - Sales of Rice, Pasta and Noodles by Category: Value 2018-2023

Table 64 - Sales of Rice, Pasta and Noodles by Category: % Volume Growth 2018-2023

Table 65 - Sales of Rice, Pasta and Noodles by Category: % Value Growth 2018-2023

Table 66 - Sales of Instant Noodles by Leading Flavours: Rankings 2018-2023

Table 67 - NBO Company Shares of Rice, Pasta and Noodles: % Value 2019-2023

Table 68 - LBN Brand Shares of Rice, Pasta and Noodles: % Value 2020-2023  
Table 69 - NBO Company Shares of Rice: % Value 2019-2023  
Table 70 - LBN Brand Shares of Rice: % Value 2020-2023  
Table 71 - NBO Company Shares of Pasta: % Value 2019-2023  
Table 72 - LBN Brand Shares of Pasta: % Value 2020-2023  
Table 73 - NBO Company Shares of Noodles: % Value 2019-2023  
Table 74 - LBN Brand Shares of Noodles: % Value 2020-2023  
Table 75 - Distribution of Rice, Pasta and Noodles by Format: % Value 2018-2023  
Table 76 - Distribution of Rice by Format: % Value 2018-2023  
Table 77 - Distribution of Pasta by Format: % Value 2018-2023  
Table 78 - Distribution of Noodles by Format: % Value 2018-2023  
Table 79 - Forecast Sales of Rice, Pasta and Noodles by Category: Volume 2023-2028  
Table 80 - Forecast Sales of Rice, Pasta and Noodles by Category: Value 2023-2028  
Table 81 - Forecast Sales of Rice, Pasta and Noodles by Category: % Volume Growth 2023-2028  
Table 82 - Forecast Sales of Rice, Pasta and Noodles by Category: % Value Growth 2023-2028

## 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-the-czech-republic/report](http://www.euromonitor.com/staple-foods-in-the-czech-republic/report).