



Euromonitor
International

Rice, Pasta and Noodles in Bosnia and Herzegovina

December 2025

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

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Staple Foods in Bosnia and Herzegovina - Industry Overview

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

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