



Rice, Pasta and Noodles in North Macedonia

March 2026

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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

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Small local grocers channel continues to dominate distribution landscape

E-commerce remains the fastest growing channel

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Staple Foods in North Macedonia - Industry Overview

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
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