



Staple Foods in the Czech Republic

November 2025

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Staple Foods in the Czech Republic

EXECUTIVE SUMMARY

Premiumisation, innovation and health trends shape growth in staple foods

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INDUSTRY PERFORMANCE

Value growth is driven by higher prices and an ongoing reliance on promotions

Rising health awareness drives demand for cleaner and higher-protein staple foods

Sustainability and convenience trends reshape staple food production and consumption

WHAT'S NEXT?

Premiumisation and innovation are set to drive steady value growth in staple foods

Convenient, healthier and free-from options are set to influence product innovation

Retail e-commerce is set to gain share as subscription models and bundled promotions increase

COMPETITIVE LANDSCAPE

Penam maintains its leadership in Czech staple foods despite a modest share decline

Lidl Ceska republika drives private label growth and reshapes competition in staple foods

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Baked goods grows as consumers favour premium, healthier, and convenient options

INDUSTRY PERFORMANCE

Baked goods value sales grow as Czech consumers shift towards quality and premium options

Pastries lead baked goods growth driven by premiumisation and artisanal trends

WHAT'S NEXT

Baked goods sales are set to grow in value despite stagnant volume

Health-focused innovation will drive growth in wholegrain, functional, and gluten-free baked goods

Sustainability in baked goods is set to focus on waste reduction, packaging, and energy-efficient production

COMPETITIVE LANDSCAPE

Penam s.r.o. leads baked goods through strong brands and extensive distribution

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[Breakfast Cereals in the Czech Republic](#)

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Value growth for breakfast cereals is driven by health trends and pack size preferences

INDUSTRY PERFORMANCE

Value sales of breakfast cereals rise as consumer confidence recovers in 2025

Health-focused muesli and granola lead value growth as consumers appreciate healthier options

WHAT'S NEXT?

Convenience, health, and premiumisation are expected to drive breakfast cereals sales

Health and wellness trends are set to drive growth in clean-label, reduced-sugar, and functional breakfast cereals

Sustainability and local sourcing will shape breakfast cereals, with organic labels driving consumer trust

COMPETITIVE LANDSCAPE

Emco spol sro leads breakfast cereal as natural and clean label offerings drive brand strength

Orbico sro leads growth through international brands and innovative, premium offerings

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INDUSTRY PERFORMANCE

Processed fruit and vegetables see value growth driven by premiumisation and convenience

Frozen processed fruit and vegetables lead growth, driven by convenience, versatility, and innovation

WHAT'S NEXT?

Growth is set to be driven by convenience and premiumisation amid economic recovery

Health and wellness trends are set to increasingly influence innovation in processed fruit and vegetables

Sustainability will drive innovation and consumer trust through packaging and sourcing

COMPETITIVE LANDSCAPE

Bonduelle spol sro maintains its leading position, despite a slight decline in share

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CHANNELS

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KEY DATA FINDINGS

2025 DEVELOPMENTS

Value growth is driven by price rises, convenience trends and the strength of private label

INDUSTRY PERFORMANCE

Processed meat and seafood sales rise amid higher prices and reduced imports from Slovakia

Meat and seafood substitutes remains the fastest-growing category despite slowdown

WHAT'S NEXT?

Rising incomes is set to boost demand for meat, seafood and alternatives to meat

Health and sustainability trends will fuel demand for meat and seafood substitutes

Sustainability is expected to drive innovation in meat and seafood, from eco-packaging to ethical sourcing

COMPETITIVE LANDSCAPE

Lidl Ceska republika leads processed meat, seafood and alternatives to meat through strong private label ranges

Private label drives the fastest growth as Czech consumers prioritise value

CHANNELS

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[Rice, Pasta and Noodles in the Czech Republic](#)

KEY DATA FINDINGS

2025 DEVELOPMENTS

Price increases and premiumisation drive the performance of rice, pasta and noodles

INDUSTRY PERFORMANCE

Modest value growth is driven by prices rises and premiumisation

Noodles, particularly instant varieties, drive growth as consumers seek convenience

WHAT'S NEXT?

Convenience and Asian-style cuisine is set to drive future growth in rice, pasta, and noodles

Rising focus on nutrition is expected to drive growth in wholegrain and high-protein options

Sustainability and eco-conscious packaging is set to shape product innovation

COMPETITIVE LANDSCAPE

Orkla Foods maintains its leadership through strong brand names and solid distribution

Nongshim drives growth through rapid expansion in instant noodles and strong flavour innovation

CHANNELS

Hypermarkets lead in rice, pasta and noodles despite gradual share erosion to smaller formats

Discounters gain momentum as some consumers favour convenience and value over large-scale hypermarket shopping

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