



Processed Meat, Seafood and Alternatives To Meat in North Macedonia

March 2026

KEY DATA FINDINGS

2025 DEVELOPMENTS

Overall demand remains stable

INDUSTRY PERFORMANCE

Chilled processed seafood is the best performing category
Health concerns limit appeal of shelf stable products

WHAT'S NEXT

Desire for convenience will remain a core demand driver
Premiumisation trend likely to gain momentum
Interest in meat and seafood substitutes set to rise

COMPETITIVE LANDSCAPE

Pekabesko strengthens its leading position
"Macedonian Best" campaign lifts sales of domestic brands

CHANNELS

Small local grocers remains the top distribution channel but continues to lose ground
E-commerce shows the fastest development

CATEGORY DATA

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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

Dardanel Greece SA is the most dynamic company in value growth terms

CHANNELS

Small local grocers still the top distribution channel

E-commerce is the best performing channel

Falling inflation and rising tourism flows boost foodservice volume sales

MARKET DATA

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Table 16 - Sales of Staple Foods by Category: Value 2020-2025

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