

Beer in Eastern Europe

July 2021

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Return to positive growth for Eastern Europe over the forecast period

Russia (just) manages to record a positive CAGR in 2015-2020

Non-alcoholic beer most dynamic over 2015-2020

Domestic mid-priced lager loses significant sales in Poland

On-trade sales collapse across the region

Off-trade increases its already dominant share in 2020

Pandemic speeds up modern grocery retailers' gains in 2020

Off-trade takes share from on-trade during pandemic in 2020

LEADING COMPANIES AND BRANDS

Beer remains a concentrated competitive landscape in Eastern Europe

Some downtrading to cheaper products seen in 2020

Russia the main market for half of Eastern Europe's top 10

Baltika continues to lead regional sales in 2020

FORECAST PROJECTIONS

Off-trade sales will continue growing year on year...

...while on-trade sales should start recovering from 2021

GDP growth to help drive beer sales in the region

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Belarus: Competitive and Retail Landscape

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