

# Coffee in Eastern Europe

August 2020

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Scope

Key findings

## REGIONAL OVERVIEW

Eastern Europe has high potential in coffee despite current slow growth

Coffee to show positive future performance in region

Fresh coffee gains share thanks to growing coffee culture

Regional shifts towards fresh coffee, with further premiumisation

Fresh coffee is the primary growth driver in coffee at regional level

Local markets vary based on economic outlook and cultural tradition

Modern retailers drive sales, while traditional retail is still strong

On-trade drives coffee culture, with a knock-on effect on the off-trade

## LEADING COMPANIES AND BRANDS

Large producers lead through strong portfolios and brand recognition

Jacobs Douwe Egberts and Nestlé SA compete for leadership

Russia is the key coffee market in Eastern Europe

Shifting demand structure leads to changes in the top 10 brands

## FORECAST PROJECTIONS

Positive performances in major markets will support regional growth

2020 will see enhanced off-trade sales, while the on-trade suffers

GDP growth and habit persistence are key to coffee performance

Growth in product availability and consumer awareness will drive sales

## COUNTRY SNAPSHOTS

Russia: market context

Russia: competitive and retail landscape

Poland: market context

Poland: competitive and retail landscape

Ukraine: market context

Ukraine: competitive and retail landscape

Romania: market context

Romania: competitive and retail landscape

Czech Republic: market context

Czech Republic: competitive and retail landscape

Hungary: market context

Hungary: competitive and retail landscape

Slovakia: market context

Slovakia: competitive and retail landscape

Belarus: market context

Belarus: competitive and retail landscape

Bulgaria: market context

Bulgaria: competitive and retail landscape

Serbia: market context

Serbia: competitive and retail landscape

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### About Euromonitor International

Euromonitor International is an independent market intelligence provider. Data, insight and analysis stem from in-the-field research spanning 210 national markets.

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- **Strategy Briefings:** Global or regional in scope, and focussing on the most important themes shaping consumer demand, the key markets, competitive environment and future outlook across a range of industries.
- **Company Profiles:** Analysis dedicated to the world's most significant companies, with detailed insight into their activities, focus of operations, their competitors, their geographic presence and performance.
- **Country Reports:** For an in-depth understanding of specific countries, whether by industry, economic metrics or consumer trends and lifestyles. These reports cover current trends, consumer demand, market potential and future prospects, with country-specific local insight and comprehensive data, unavailable elsewhere.

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