

# Baked Goods in Eastern Europe

April 2021

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Key findings

## REGIONAL OVERVIEW

Eastern Europe with below-average sales growth over 2015-2020

Slow growth expected over the forecast period

Romania and Poland add the most new retail value in 2015-2020

HW bread driving the additional value in Romania and the Czech Republic

Bread adds the most new sales despite its modest CAGR in 2015-2020

Baked goods performances slow in many countries in 2020

Supermarkets still the main retail distribution channel

Modern grocery retailers continue to gain share

## LEADING COMPANIES AND BRANDS

Fragmented baked goods is dominated by players under “others”

Agrofert moves up the rankings after its United Bakeries takeover

Chipita has the widest presence across Eastern European baked goods

Private label gains share in 2020 due to COVID-19's economic impact

## FORECAST PROJECTIONS

Modest growth rates expected from 2021

HW bread will help drive the baked goods performance in 2020-2025

Strong price growth expected in Bulgaria and Hungary

## COUNTRY SNAPSHOTS

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Belarus: Competitive and Retail Landscape

Bosnia and Herzegovina: Market Context

Bosnia and Herzegovina: Competitive and Retail Landscape

Bulgaria: Market Context

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