

Sauces, Dressings and Condiments in Eastern Europe

February 2021

Table of Contents

INTRODUCTION

Scope

Key findings

REGIONAL OVERVIEW

Modest sales growth for Eastern Europe in 2020 and the historic period

Growth rates to slow down after the pandemic-induced 2020 spike

Russia and Poland the main growth drivers

Soy sauces enjoying dynamic growth in Russia

Russia table sauces and Polish herbs and spices drive overall sales

Growth in Eastern Europe is driven by anti-COVID-19 measures in 2020

Modern grocery retailers the dominant force in retail distribution

Strong e-commerce sales and share growth, albeit from a small base

LEADING COMPANIES AND BRANDS

Sauces, dressings and condiments a fragmented landscape

Multinationals Nestlé and Unilever continue to lead

Russia is the main revenue generator for most top 10 players

No changes in the leading brands, with Maheev still number one

FORECAST PROJECTIONS

Eastern Europe to see declining sales in 2021...

...but then a return to positive growth from 2022

COUNTRY SNAPSHOTS

Belarus: Market Context

Belarus: Competitive and Retail Landscape

Bosnia and Herzegovina: Market Context

Bosnia and Herzegovina: Competitive and Retail Landscape

Bulgaria: Market Context

Bulgaria: Competitive and Retail Landscape

Croatia: Market Context

Croatia: Competitive and Retail Landscape

Czech Republic: Market Context

Czech Republic: Competitive and Retail Landscape

Estonia: Market Context

Estonia: Competitive and Retail Landscape

Georgia: Market Context

COUNTRY SNAPSHOTS

Georgia: Competitive and Retail Landscape

Hungary: Market Context

Hungary: Competitive and Retail Landscape

Latvia: Market Context

Latvia: Competitive and Retail Landscape

Lithuania: Market Context

Lithuania: Competitive and Retail Landscape

North Macedonia: Market Context

North Macedonia: Competitive and Retail Landscape

Poland: Market Context

Poland: Competitive and Retail Landscape

Romania: Market Context

Romania: Competitive and Retail Landscape

Russia: Market Context

Russia: Competitive and Retail Landscape

Serbia: Market Context

Serbia: Competitive and Retail Landscape

Slovakia: Market Context

Slovakia: Competitive and Retail Landscape

Slovenia: Market Context

Slovenia: Competitive and Retail Landscape

Ukraine: Market Context

Ukraine: Competitive and Retail Landscape

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