

Bottled Water in Eastern Europe

June 2021

Table of Contents

INTRODUCTION

Scope Key findings

REGIONAL OVERVIEW

Eastern Europe from a global perspective Bottled water on the rise but growing slowly Still water gains momentum but carbonated also growing Consumer preferences vary by country Uncertain prospects of flavoured bottled water Functional bottled water is gaining ground COVID-19 performance of bottled water varied across the region Modern grocery retailers on the rise while non-store led by e-commerce Uneven performance of distribution channels

LEADING COMPANIES AND BRANDS

Consolidation is growing in the region Local leaders show growth and IDS Borjomi leads in several markets Portfolio management and brand awareness are key to success Change of leadership in bottled water

FORECAST PROJECTIONS

Regional volume leaders to lead growth Factors stimulating recovery and growth over the forecast period Key drivers affecting category performance by country Growth prospects are bright but barriers remain in the way

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 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

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.

Content ranges from the in-depth and country-specific, to key strategic themes with a global range and significance. Products cover a comprehensive range of insights and market data, but can be broadly categorised as:

- 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.

For more information on this report, further enquiries can be directed via this link www.euromonitor.com/bottled-water-in-eastern-europe/report.