

Carbonates in North Macedonia

December 2022

Table of Contents

Carbonates in North Macedonia - Category analysis

KEY DATA FINDINGS

2022 DEVELOPMENTS

Moderate growth maintained despite consumer switch to healthier options

Growing consumer demand for reduced sugar options as well as high inflation dictate the performance of carbonate sales

Pivara Skopje continues to lead despite investments of Prilepska Pivarnica in improving its image

PROSPECTS AND OPPORTUNITIES

Carbonates to see a marked deceleration in off-trade volume growth as the largest category does not align with health and wellness trends

Reduced sugar carbonates to accelerate moderately thanks to growing options

Regular orange carbonates has a bright future ahead as consumers think that reduced sugar versions lack flavour

CATEGORY DATA

Table 1 - Off-trade vs On-trade Sales of Carbonates: Volume 2017-2022

Table 2 - Off-trade vs On-trade Sales of Carbonates: Value 2017-2022

Table 3 - Off-trade vs On-trade Sales of Carbonates: % Volume Growth 2017-2022

Table 4 - Off-trade vs On-trade Sales of Carbonates: % Value Growth 2017-2022

Table 5 - Off-trade Sales of Carbonates by Category: Volume 2017-2022

Table 6 - Off-trade Sales of Carbonates by Category: Value 2017-2022

Table 7 - Off-trade Sales of Carbonates by Category: % Volume Growth 2017-2022

Table 8 - Off-trade Sales of Carbonates by Category: % Value Growth 2017-2022

Table 9 - Sales of Carbonates by Total Fountain On-trade: Volume 2017-2022

Table 10 - Sales of Carbonates by Total Fountain On-trade: % Volume Growth 2017-2022

Table 11 - NBO Company Shares of Off-trade Carbonates: % Volume 2018-2022

Table 12 - LBN Brand Shares of Off-trade Carbonates: % Volume 2019-2022

Table 13 - NBO Company Shares of Off-trade Carbonates: % Value 2018-2022

Table 14 - LBN Brand Shares of Off-trade Carbonates: % Value 2019-2022

Table 15 - Forecast Off-trade Sales of Carbonates by Category: Volume 2022-2027

Table 16 - Forecast Off-trade Sales of Carbonates by Category: Value 2022-2027

Table 17 - Forecast Off-trade Sales of Carbonates by Category: % Volume Growth 2022-2027

Table 18 - Forecast Off-trade Sales of Carbonates by Category: % Value Growth 2022-2027

Table 19 - Forecast Sales of Carbonates by Total Fountain On-trade: Volume 2022-2027

Table 20 - Forecast Sales of Carbonates by Total Fountain On-trade: % Volume Growth 2022-2027

Soft Drinks in North Macedonia - Industry Overview

EXECUTIVE SUMMARY

Soft drinks in 2022: The big picture

2022 key trends

Competitive landscape

Retailing developments

Foodservice vs retail split

What next for soft drinks?

MARKET DATA

Table 21 - Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: Volume 2017-2022

Table 22 - Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: % Volume Growth 2017-2022

Table 23 - Off-trade vs On-trade Sales of Soft Drinks by Channel: Value 2017-2022

Table 24 - Off-trade vs On-trade Sales of Soft Drinks by Channel: % Value Growth 2017-2022

Table 25 - Off-trade vs On-trade Sales of Soft Drinks (as sold) by Category: Volume 2021

Table 26 - Off-trade vs On-trade Sales of Soft Drinks (as sold) by Category: % Volume 2021

Table 27 - Off-trade vs On-trade Sales of Soft Drinks by Category: Value 2021

Table 28 - Off-trade vs On-trade Sales of Soft Drinks by Category: % Value 2021
 Table 29 - Off-trade Sales of Soft Drinks (RTD) by Category: Volume 2017-2022
 Table 30 - Off-trade Sales of Soft Drinks (RTD) by Category: % Volume Growth 2017-2022
 Table 31 - Off-trade Sales of Soft Drinks by Category: Value 2017-2022
 Table 32 - Off-trade Sales of Soft Drinks by Category: % Value Growth 2017-2022
 Table 33 - Sales of Soft Drinks by Total Fountain On-trade: Volume 2017-2022
 Table 34 - Sales of Soft Drinks by Total Fountain On-trade: % Volume Growth 2017-2022
 Table 35 - NBO Company Shares of Off-trade Soft Drinks (RTD): % Volume 2018-2022
 Table 36 - LBN Brand Shares of Off-trade Soft Drinks (RTD): % Volume 2019-2022
 Table 37 - NBO Company Shares of Off-trade Soft Drinks: % Value 2018-2022
 Table 38 - LBN Brand Shares of Off-trade Soft Drinks: % Value 2019-2022
 Table 39 - Penetration of Private Label in Off-trade Soft Drinks (RTD) by Category: % Volume 2017-2022
 Table 40 - Penetration of Private Label in Off-trade Soft Drinks by Category: % Value 2017-2022
 Table 41 - Distribution of Off-trade Soft Drinks (as sold) by Format: % Volume 2017-2022
 Table 42 - Distribution of Off-trade Soft Drinks (as sold) by Format and Category: % Volume 2022
 Table 43 - Forecast Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: Volume 2022-2027
 Table 44 - Forecast Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: % Volume Growth 2022-2027
 Table 45 - Forecast Off-trade vs On-trade Sales of Soft Drinks by Channel: Value 2022-2027
 Table 46 - Forecast Off-trade vs On-trade Sales of Soft Drinks by Channel: % Value Growth 2022-2027
 Table 47 - Forecast Off-trade Sales of Soft Drinks (RTD) by Category: Volume 2022-2027
 Table 48 - Forecast Off-trade Sales of Soft Drinks (RTD) by Category: % Volume Growth 2022-2027
 Table 49 - Forecast Off-trade Sales of Soft Drinks by Category: Value 2022-2027
 Table 50 - Forecast Off-trade Sales of Soft Drinks by Category: % Value Growth 2022-2027
 Table 51 - Forecast Sales of Soft Drinks by Total Fountain On-trade: Volume 2022-2027
 Table 52 - Forecast Sales of Soft Drinks by Total Fountain On-trade: % Volume Growth 2022-2027

DISCLAIMER

SOURCES

Summary 1 - Research Sources

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/carbonates-in-north-macedonia/report.