



# Baked Goods in Eastern Europe

April 2021

Table of Contents

## INTRODUCTION

Scope

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

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/baked-goods-in-eastern-europe/report](http://www.euromonitor.com/baked-goods-in-eastern-europe/report).