



Passport

Processed Fruit and Vegetables in Slovakia

Euromonitor International

December 2021

This sample report is for illustration
purposes only.

Some content and data have been
changed.

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PROCESSED FRUIT AND VEGETABLES IN SLOVAKIA - CATEGORY ANALYSIS

KEY DATA FINDINGS

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2021 DEVELOPMENTS

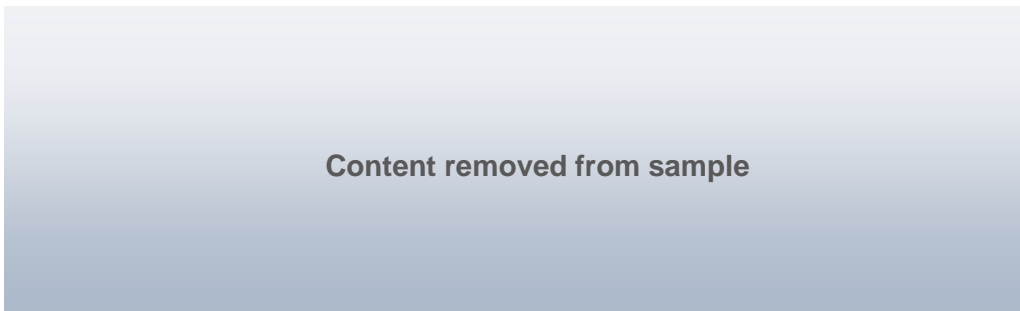
Sustained demand for convenient vegetable options as consumers continue to seek quick, easy meal solutions

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Processed fruit and vegetables fend off challenge from fresh versions thanks to convenience trends

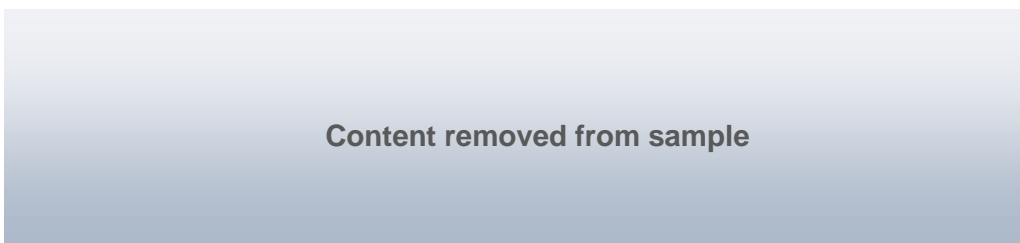
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Consequences of 2020 stockpiling limits retail consumption at start of year

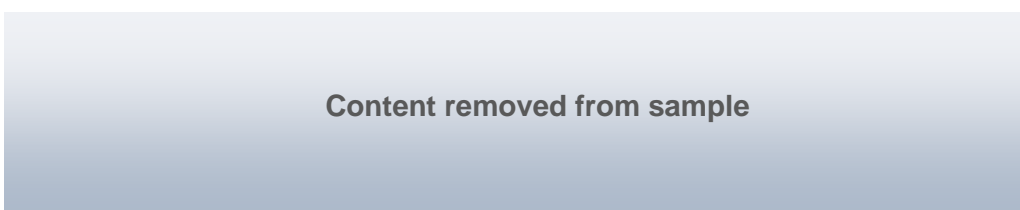


PROSPECTS AND OPPORTUNITIES

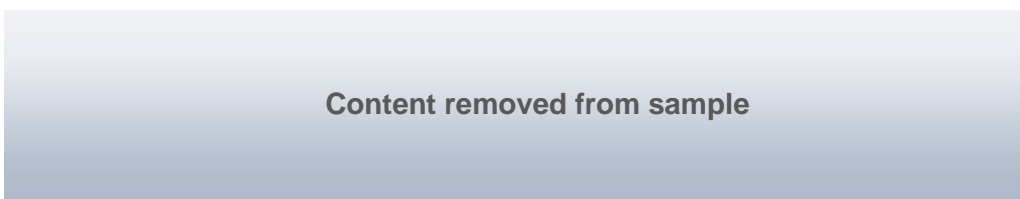
Potential limitation to category retail performance due sales via the grey market



Key players to diminish rise of private label by offering special price promotions



Price and convenience benefits to promote shift to e-commerce



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CATEGORY DATA

Table 1 Sales of Processed Fruit and Vegetables by Category: Volume 2016-2021

'000 tonnes	2016	2017	2018	2019	2020	2021
Processed Fruit and Vegetables	Data removed from sample					
Shelf Stable Fruit and Vegetables						
- Shelf Stable Beans						
- Shelf Stable Fruit						
- Shelf Stable Tomatoes						
- Shelf Stable Vegetables						
Frozen Processed Fruit and Vegetables						
- Frozen Fruit						
- Frozen Processed Potatoes						
- Frozen Processed Vegetables						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 2 Sales of Processed Fruit and Vegetables by Category: Value 2016-2021

EUR million	2016	2017	2018	2019	2020	2021
Processed Fruit and Vegetables	Data removed from sample					
Shelf Stable Fruit and Vegetables						
- Shelf Stable Beans						
- Shelf Stable Fruit						
- Shelf Stable Tomatoes						
- Shelf Stable Vegetables						
Frozen Processed Fruit and Vegetables						
- Frozen Fruit						
- Frozen Processed Potatoes						
- Frozen Processed Vegetables						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 3 Sales of Processed Fruit and Vegetables by Category: % Volume Growth 2016-2021

% volume growth

	2020/21	2016-21 CAGR	2016/21 Total
Processed Fruit and Vegetables	Data removed from sample		
Shelf Stable Fruit and Vegetables			
- Shelf Stable Beans			
- Shelf Stable Fruit			
- Shelf Stable Tomatoes			
- Shelf Stable Vegetables			
Frozen Processed Fruit and Vegetables			
- Frozen Fruit			
- Frozen Processed Potatoes			
- Frozen Processed Vegetables			

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 4 Sales of Processed Fruit and Vegetables by Category: % Value Growth 2016-2021

% current value growth

	2020/21	2016-21 CAGR	2016/21 Total
Processed Fruit and Vegetables	Data removed from sample		
Shelf Stable Fruit and Vegetables			
- Shelf Stable Beans			
- Shelf Stable Fruit			
- Shelf Stable Tomatoes			
- Shelf Stable Vegetables			
Frozen Processed Fruit and Vegetables			
- Frozen Fruit			
- Frozen Processed Potatoes			
- Frozen Processed Vegetables			

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 5 Sales of Frozen Processed Vegetables by Type: % Value Breakdown 2016-2021

% retail value rsp

	2016	2017	2018	2019	2020	2021
Baby Carrots	Data removed from sample					
Broccoli Florets						
Carrots						
Chinese Mix						
Corn						
Mixed Packs						
Mushrooms						
Peas						
Spinach						
Vegetable Soup Mix						
Others						
Total						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 6 NBO Company Shares of Processed Fruit and Vegetables: % Value 2017-2021

% retail value rsp Company	2017	2018	2019	2020	2021
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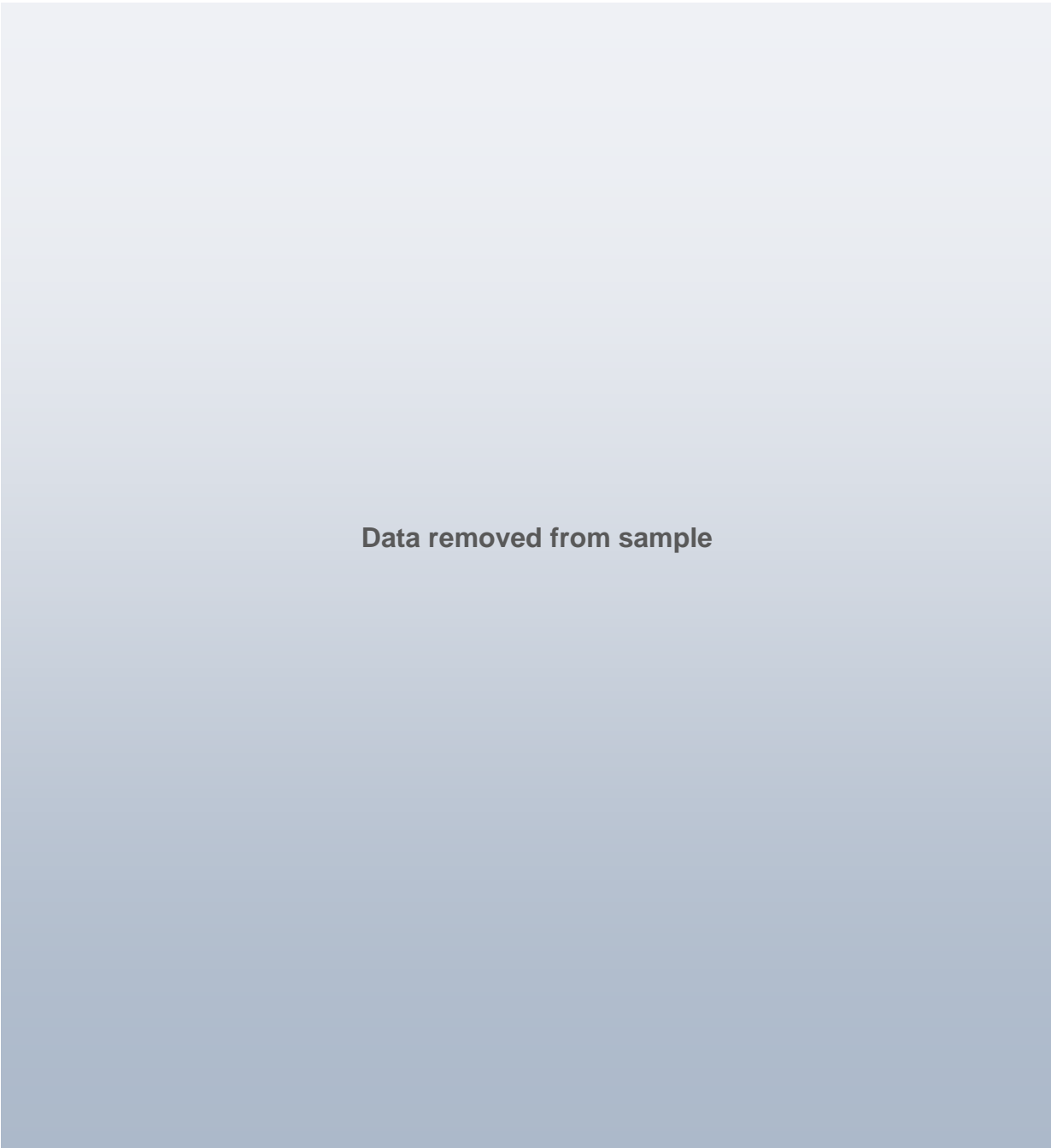
Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 7 LBN Brand Shares of Processed Fruit and Vegetables: % Value 2018-2021

% retail value rsp Brand (GBO)	Company (NBO)	2018	2019	2020	2021
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Data removed from sample

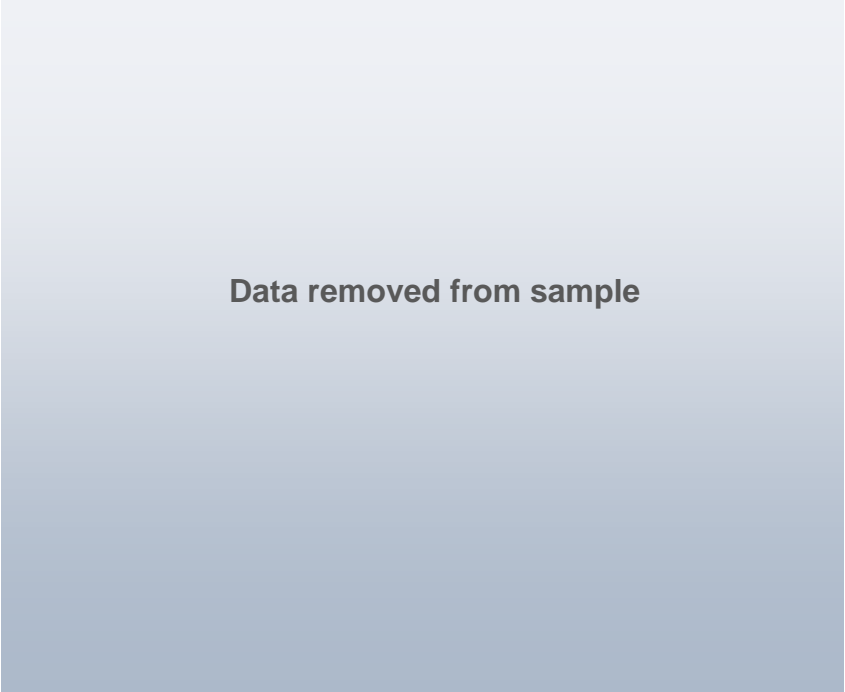


Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 8 Distribution of Processed Fruit and Vegetables by Format: % Value 2016-2021

% retail value rsp	2016	2017	2018	2019	2020	2021
Store-Based Retailing - Grocery Retailers -- Modern Grocery Retailers	Data removed from sample					

- Convenience Stores
- Discounters
- Forecourt Retailers
- Hypermarkets
- Supermarkets
- Traditional Grocery Retailers
- Food/drink/tobacco specialists
- Independent Small Grocers
- Other Grocery Retailers
- Non-Grocery Specialists
- Health and Beauty Specialist Retailers
- Other Foods Non-Grocery Specialists
- Mixed Retailers
- Non-Store Retailing
- Vending
- Homeshopping
- E-Commerce
- Direct Selling
- Total



Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 9 Forecast Sales of Processed Fruit and Vegetables by Category: Volume 2021-2026

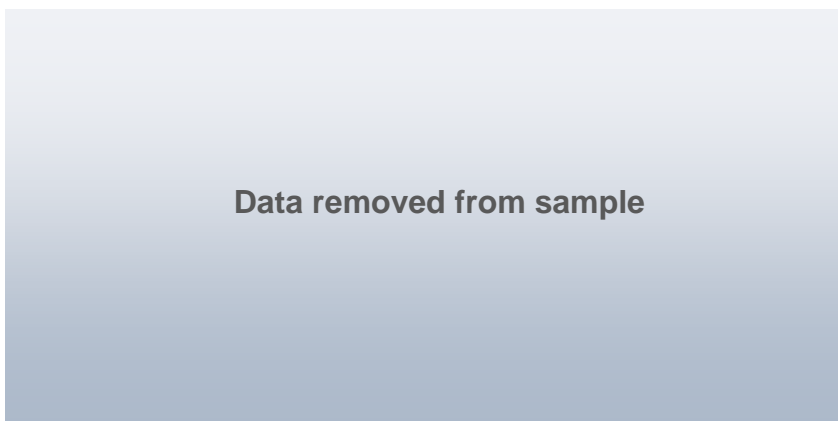
'000 tonnes	2021	2022	2023	2024	2025	2026
Processed Fruit and Vegetables	Data removed from sample					
Shelf Stable Fruit and Vegetables						
- Shelf Stable Beans						
- Shelf Stable Fruit						
- Shelf Stable Tomatoes						
- Shelf Stable Vegetables						
Frozen Processed Fruit and Vegetables						
- Frozen Fruit						
- Frozen Processed Potatoes						
- Frozen Processed Vegetables						

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 10 Forecast Sales of Processed Fruit and Vegetables by Category: Value 2021-2026

EUR million	2021	2022	2023	2024	2025	2026
	Data removed from sample					

- Processed Fruit and Vegetables
- Shelf Stable Fruit and Vegetables
- Shelf Stable Beans
- Shelf Stable Fruit
- Shelf Stable Tomatoes
- Shelf Stable Vegetables
- Frozen Processed Fruit and Vegetables
- Frozen Fruit
- Frozen Processed Potatoes
- Frozen Processed Vegetables



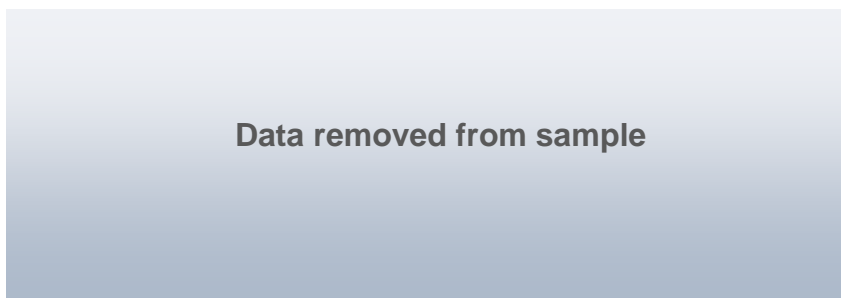
Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 11 Forecast Sales of Processed Fruit and Vegetables by Category: % Volume Growth 2021-2026

% volume growth

2021/22 2021-26 CAGR 2021/26 Total

- Processed Fruit and Vegetables
- Shelf Stable Fruit and Vegetables
- Shelf Stable Beans
- Shelf Stable Fruit
- Shelf Stable Tomatoes
- Shelf Stable Vegetables
- Frozen Processed Fruit and Vegetables
- Frozen Fruit
- Frozen Processed Potatoes
- Frozen Processed Vegetables



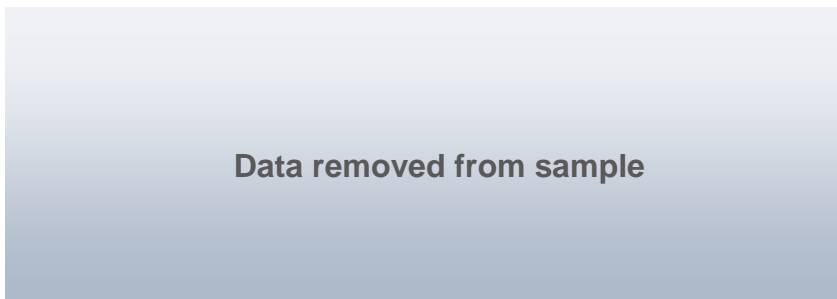
Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 12 Forecast Sales of Processed Fruit and Vegetables by Category: % Value Growth 2021-2026

% constant value growth

2021/2022 2021-26 CAGR 2021/26 Total

- Processed Fruit and Vegetables
- Shelf Stable Fruit and Vegetables
- Shelf Stable Beans
- Shelf Stable Fruit
- Shelf Stable Tomatoes
- Shelf Stable Vegetables
- Frozen Processed Fruit and Vegetables
- Frozen Fruit
- Frozen Processed Potatoes
- Frozen Processed Vegetables



Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

STAPLE FOODS IN SLOVAKIA - INDUSTRY OVERVIEW

EXECUTIVE SUMMARY

Staple foods in 2021: The big picture

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Key trends in 2021

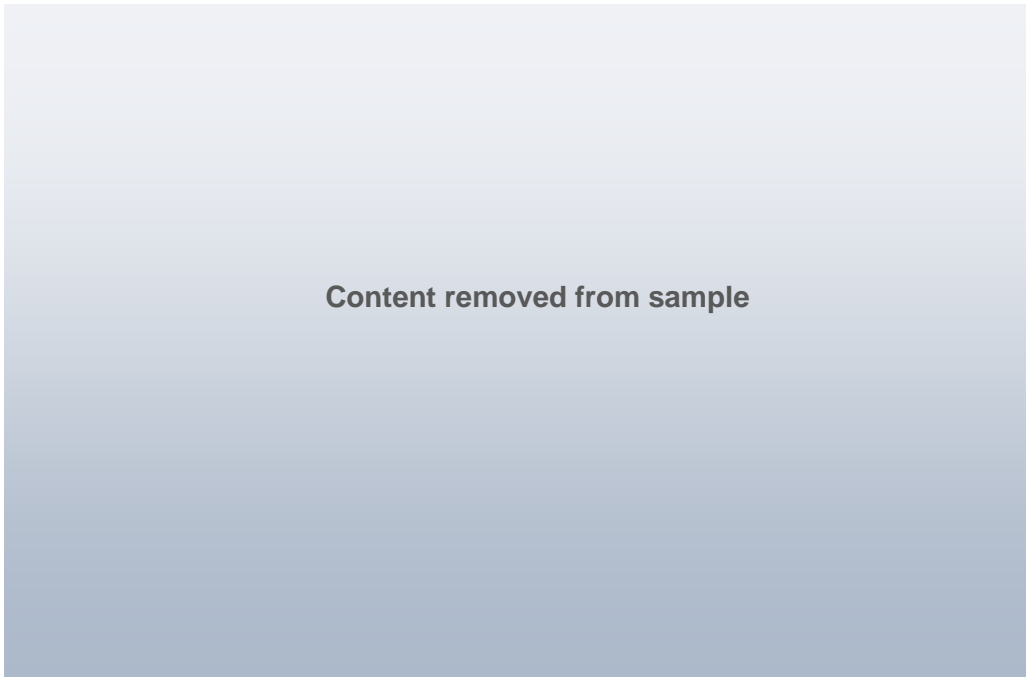
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Competitive Landscape

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Channel developments

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What next for staple foods?

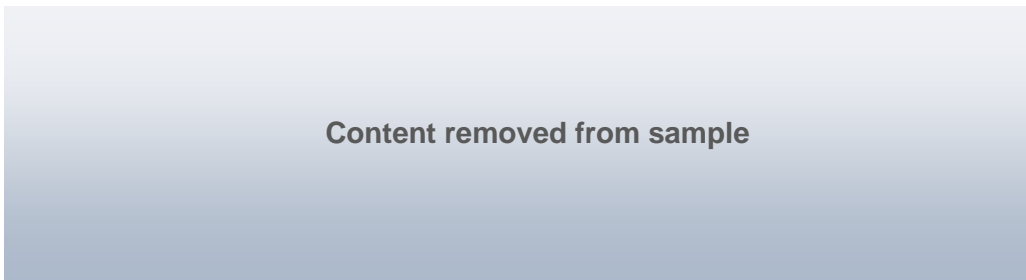


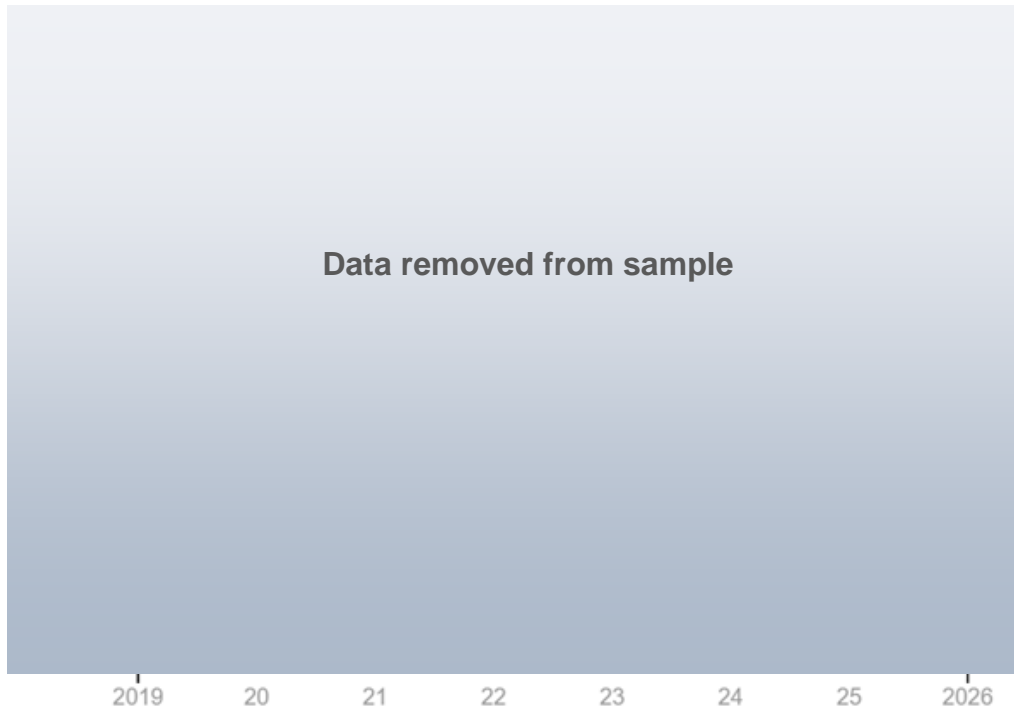
Chart 1 Staple Foods Value Sales Growth Scenarios: 2019-2026

Retail Value Sales, Real, US\$ mn, 2019 - 2026

2021 Constant Prices, 2021 Fixed Year Exchange Rate

Staple Foods - Slovakia

Passport Baseline C19 Pessimistic1



Source: Euromonitor International Industry Forecast Model

Chart 2 Staple Foods Impact of Drivers on Value Sales: 2019-2026

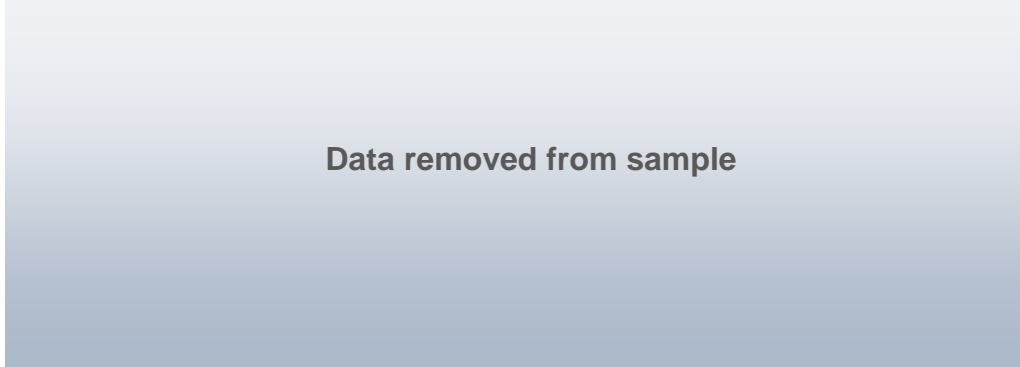
Retail Value Sales, Real US\$ mn 2019 - 2026

2021 Constant Prices, 2021 Fixed Year Exchange Rate

Slovakia - Staple Foods

Retail Value Sales, Real Growth

Passport Baseline



Source: Euromonitor International Industry Forecast Model

MARKET DATA

Table 13 Sales of Staple Foods by Category: Volume 2016-2021

'000 tonnes

	2016	2017	2018	2019	2020	2021
Baked Goods	Data removed from sample					
Breakfast Cereals						
Processed Fruit and Vegetables						
Processed Meat, Seafood and Alternatives to Meat						
Rice, Pasta and Noodles						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 14 Sales of Staple Foods by Category: Value 2016-2021

EUR million

	2016	2017	2018	2019	2020	2021
Baked Goods	Data removed from sample					
Breakfast Cereals						
Processed Fruit and Vegetables						
Processed Meat, Seafood and Alternatives to Meat						
Rice, Pasta and Noodles						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 15 Sales of Staple Foods by Category: % Volume Growth 2016-2021

% volume growth

	2020/21	2016-21 CAGR	2016/21 Total
Staple Foods	Data removed from sample		
Baked Goods			
Breakfast Cereals			
Processed Fruit and Vegetables			
Processed Meat, Seafood and Alternatives to Meat			
Rice, Pasta and Noodles			

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 16 Sales of Staple Foods by Category: % Value Growth 2016-2021

% current value growth

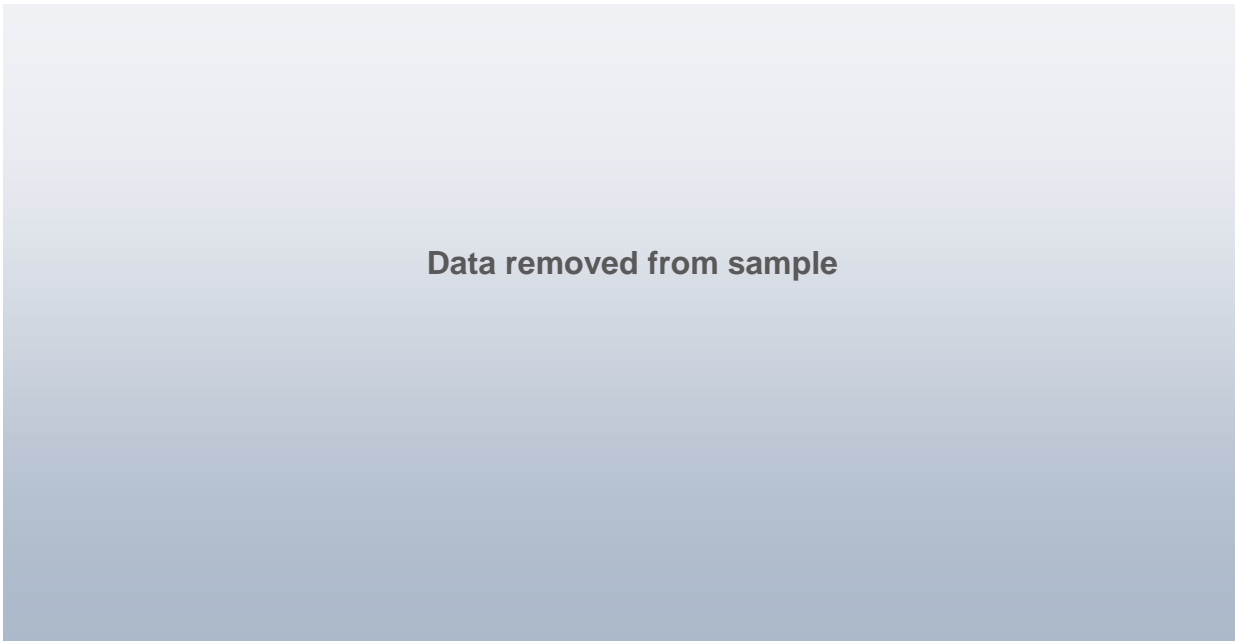
	2020/21	2016-21 CAGR	2016/21 Total
Staple Foods	Data removed from sample		
Baked Goods			
Breakfast Cereals			
Processed Fruit and Vegetables			
Processed Meat, Seafood and Alternatives to Meat			
Rice, Pasta and Noodles			

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 17 NBO Company Shares of Staple Foods: % Value 2017-2021

% retail value rsp

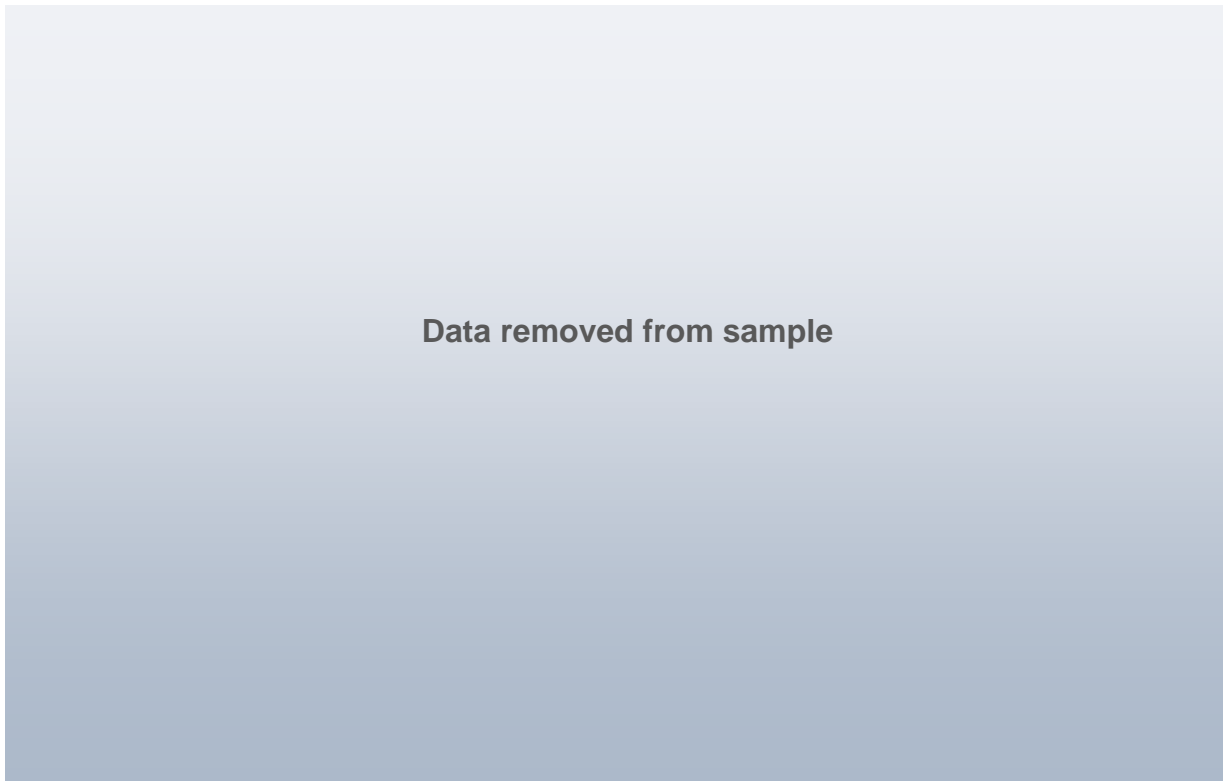
Company	2017	2018	2019	2020	2021
Data removed from sample					

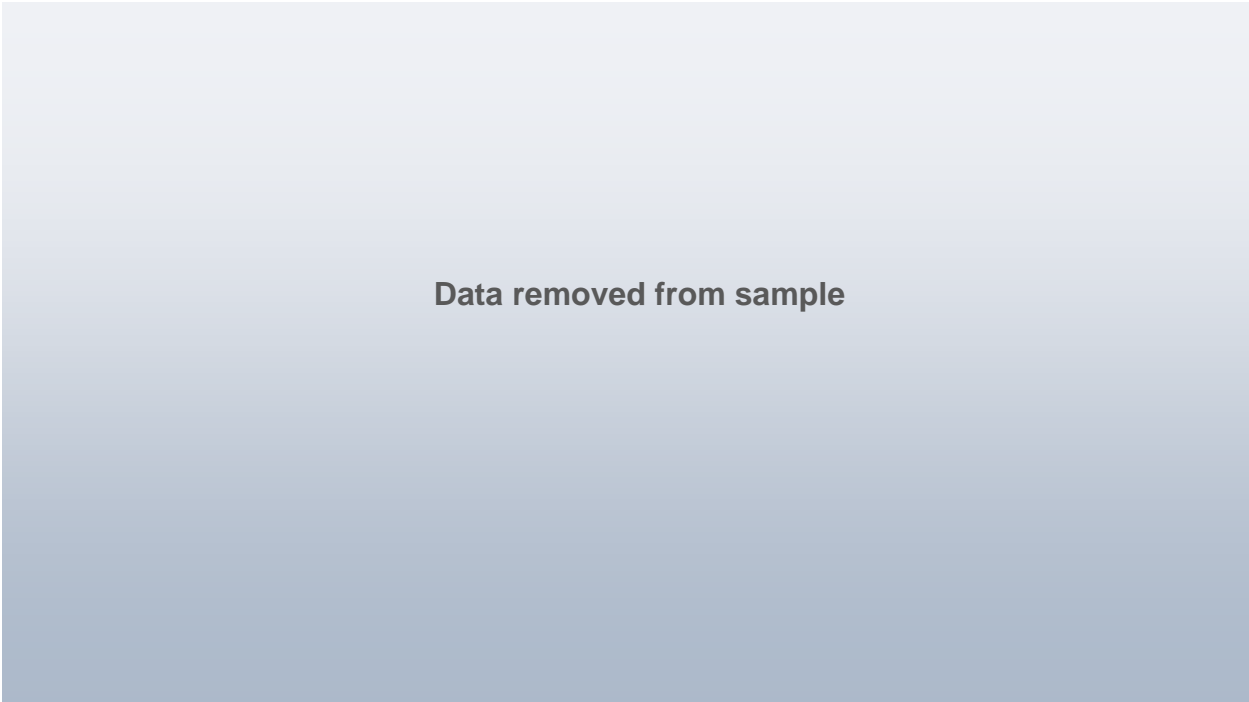


Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 18 LBN Brand Shares of Staple Foods: % Value 2018-2021

% retail value rsp Brand (GBO)	Company (NBO)	2018	2019	2020	2021
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Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 19 Penetration of Private Label by Category: % Value 2016-2021

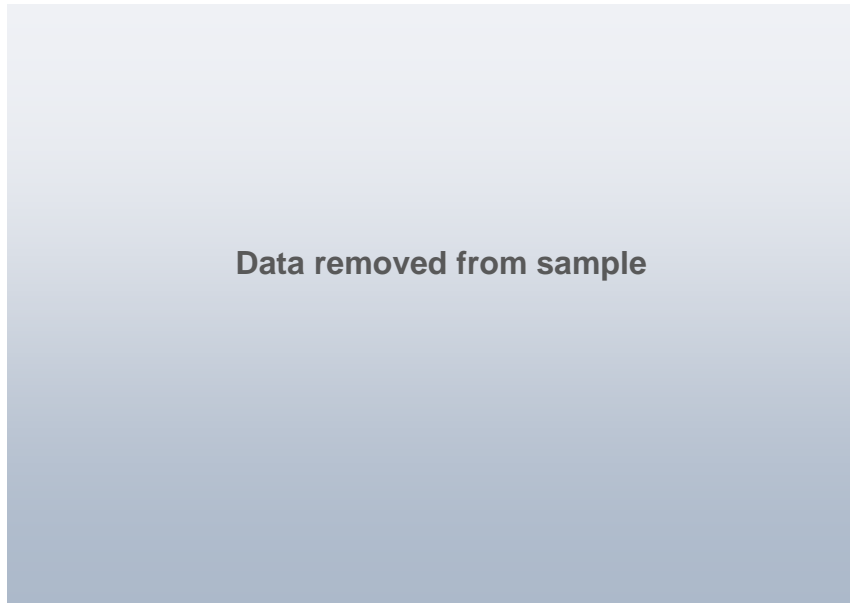
% retail value rsp	2016	2017	2018	2019	2020	2021
Baked Goods	Data removed from sample					
Breakfast Cereals						
Processed Fruit and Vegetables						
Processed Meat, Seafood and Alternatives to Meat						
Rice, Pasta and Noodles						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 20 Distribution of Staple Foods by Format: % Value 2016-2021

% retail value rsp	2016	2017	2018	2019	2020	2021
Store-Based Retailing	Data removed from sample					
- Grocery Retailers						
-- Modern Grocery Retailers						
--- Convenience Stores						
--- Discounters						
--- Forecourt Retailers						

- Hypermarkets
- Supermarkets
- Traditional Grocery Retailers
- Food/drink/tobacco specialists
- Independent Small Grocers
- Other Grocery Retailers
- Non-Grocery Specialists
- Health and Beauty Specialist Retailers
- Other Foods Non-Grocery Specialists
- Mixed Retailers
- Non-Store Retailing
- Vending
- Homeshopping
- E-Commerce
- Direct Selling
- Total



Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 21 Forecast Sales of Staple Foods by Category: Volume 2021-2026

'000 tonnes

	2021	2022	2023	2024	2025	2026
Baked Goods	Data removed from sample					
Breakfast Cereals						
Processed Fruit and Vegetables						
Processed Meat, Seafood and Alternatives to Meat						
Rice, Pasta and Noodles						

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 22 Forecast Sales of Staple Foods by Category: Value 2021-2026

EUR million

	2021	2022	2023	2024	2025	2026
Baked Goods	Data removed from sample					
Breakfast Cereals						
Processed Fruit and Vegetables						
Processed Meat, Seafood and Alternatives to Meat						
Rice, Pasta and Noodles						

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 23 Forecast Sales of Staple Foods by Category: % Volume Growth 2021-2026

% volume growth	2021/22	2021-26 CAGR	2021/26 Total
Staple Foods	Data removed from sample		
Baked Goods			
Breakfast Cereals			
Processed Fruit and Vegetables			
Processed Meat, Seafood and Alternatives to Meat			
Rice, Pasta and Noodles			

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 24 Forecast Sales of Staple Foods by Category: % Value Growth 2021-2026

% constant value growth	2021/2022	2021-26 CAGR	2021/26 Total
Staple Foods	Data removed from sample		
Baked Goods			
Breakfast Cereals			
Processed Fruit and Vegetables			
Processed Meat, Seafood and Alternatives to Meat			
Rice, Pasta and Noodles			

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

DISCLAIMER

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SOURCES

Sources used during research include the following:

Summary 1 Research Sources

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Source: Euromonitor International