

Soft Drinks in North Macedonia

Market Direction | 2024-01-16 | 78 pages | Euromonitor

AVAILABLE LICENSES:

- Single User Licence €1750.00
- Multiple User License (1 Site) €3500.00
- Multiple User License (Global) €5250.00

Report description:

Soft drinks achieved minimal off-trade volume growth and double-digit off-trade value growth in North Macedonia in 2023 amidst rising unit prices and the broader impact of inflation. The on-trade recovery of soft drinks continued during the year, with consumers returning to familiar lifestyles and the category finally surpassing the level of sales seen before the outbreak of COVID-19. The strong off-trade value growth of soft drinks seen in 2023 was primarily due to the dynamic off-trade perform...

Euromonitor International's Soft Drinks in North Macedonia report offers a comprehensive guide to the size and shape of the market at a national level. It provides the latest retail sales data (2019-2023), allowing you to identify the sectors driving growth. It identifies the leading companies, the leading brands and offers strategic analysis of key factors influencing the market - be they legislative, distribution, packaging or pricing issues. Forecasts to 2028 illustrate how the market is set to change.

Product coverage: Asian Speciality Drinks, Bottled Water, Carbonates, Concentrates, Energy Drinks, Juice, RTD Coffee, RTD Tea, Sports Drinks.

Data coverage: market sizes (historic and forecasts), company shares, brand shares and distribution data.

Why buy this report?

- * Get a detailed picture of the Soft Drinks market;
- * Pinpoint growth sectors and identify factors driving change;
- * Understand the competitive environment, the market's major players and leading brands;
- * Use five-year forecasts to assess how the market is predicted to develop.

Euromonitor International has over 40 years' experience of publishing market research reports, business reference books and online information systems. With offices in London, Chicago, Singapore, Shanghai, Vilnius, Dubai, Cape Town, Santiago, Sydney, Tokyo and Bangalore and a network of over 800 analysts worldwide, Euromonitor International has a unique capability to develop reliable information resources to help drive informed strategic planning.

Table of Contents:

Soft Drinks in North Macedonia

Euromonitor International

May 2024

List Of Contents And Tables

SOFT DRINKS IN NORTH MACEDONIA

EXECUTIVE SUMMARY

Soft drinks in 2023: The big picture

2023 key trends

Competitive landscape

Retailing developments

Foodservice vs retail split

What next for soft drinks?

MARKET DATA

Table 1 Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: Volume 2018-2023

Table 2 Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: % Volume Growth 2018-2023

Table 3 Off-trade vs On-trade Sales of Soft Drinks by Channel: Value 2018-2023

Table 4 Off-trade vs On-trade Sales of Soft Drinks by Channel: % Value Growth 2018-2023

Table 5 Off-trade vs On-trade Sales of Soft Drinks (as sold) by Category: Volume 2023

Table 6 Off-trade vs On-trade Sales of Soft Drinks (as sold) by Category: % Volume 2023

Table 7 Off-trade vs On-trade Sales of Soft Drinks by Category: Value 2023

Table 8 Off-trade vs On-trade Sales of Soft Drinks by Category: % Value 2023

Table 9 Off-trade Sales of Soft Drinks (RTD) by Category: Volume 2018-2023

Table 10 Off-trade Sales of Soft Drinks (RTD) by Category: % Volume Growth 2018-2023

Table 11 Off-trade Sales of Soft Drinks by Category: Value 2018-2023

Table 12 Off-trade Sales of Soft Drinks by Category: % Value Growth 2018-2023

Table 13 Sales of Soft Drinks by Total Fountain On-trade: Volume 2018-2023

Table 14 Sales of Soft Drinks by Total Fountain On-trade: % Volume Growth 2018-2023

Table 15 NBO Company Shares of Off-trade Soft Drinks (RTD): % Volume 2019-2023

Table 16 LBN Brand Shares of Off-trade Soft Drinks (RTD): % Volume 2020-2023

Table 17 NBO Company Shares of Off-trade Soft Drinks: % Value 2019-2023

Table 18 LBN Brand Shares of Off-trade Soft Drinks: % Value 2020-2023

Table 19 Penetration of Private Label in Off-trade Soft Drinks (RTD) by Category: % Volume 2018-2023

Table 20 Penetration of Private Label in Off-trade Soft Drinks by Category: % Value 2018-2023

Table 21 Distribution of Off-trade Soft Drinks (as sold) by Format: % Volume 2018-2023

Table 22 Distribution of Off-trade Soft Drinks (as sold) by Format and Category: % Volume 2023

Table 23 Forecast Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: Volume 2023-2028

Table 24 Forecast Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: % Volume Growth 2023-2028

Table 25 Forecast Off-trade vs On-trade Sales of Soft Drinks by Channel: Value 2023-2028

Table 26 Forecast Off-trade vs On-trade Sales of Soft Drinks by Channel: % Value Growth 2023-2028

Table 27 Forecast Off-trade Sales of Soft Drinks (RTD) by Category: Volume 2023-2028

Table 28 Forecast Off-trade Sales of Soft Drinks (RTD) by Category: % Volume Growth 2023-2028

Table 29 Forecast Off-trade Sales of Soft Drinks by Category: Value 2023-2028

Table 30 Forecast Off-trade Sales of Soft Drinks by Category: % Value Growth 2023-2028

Table 31 Forecast Sales of Soft Drinks by Total Fountain On-trade: Volume 2023-2028

Table 32 □Forecast Sales of Soft Drinks by Total Fountain On-trade: % Volume Growth 2023-2028

DISCLAIMER

SOURCES

Summary 1 Research Sources

CARBONATES IN NORTH MACEDONIA

KEY DATA FINDINGS

2023 DEVELOPMENTS

Unhealthy image negatively impacts volume sales

Cola carbonates hit hard by health and wellness trend

Pivara Skopje retains lead

PROSPECTS AND OPPORTUNITIES

Minimal growth expected

Further expansion of regular tonic water/mixers/other bitters

Continued decline of regular cola carbonates

CATEGORY DATA

Table 33 Off-trade vs On-trade Sales of Carbonates: Volume 2018-2023

Table 34 Off-trade vs On-trade Sales of Carbonates: Value 2018-2023

Table 35 Off-trade vs On-trade Sales of Carbonates: % Volume Growth 2018-2023

Table 36 Off-trade vs On-trade Sales of Carbonates: % Value Growth 2018-2023

Table 37 Off-trade Sales of Carbonates by Category: Volume 2018-2023

Table 38 Off-trade Sales of Carbonates by Category: Value 2018-2023

Table 39 Off-trade Sales of Carbonates by Category: % Volume Growth 2018-2023

Table 40 Off-trade Sales of Carbonates by Category: % Value Growth 2018-2023

Table 41 Sales of Carbonates by Total Fountain On-trade: Volume 2018-2023

Table 42 □Sales of Carbonates by Total Fountain On-trade: % Volume Growth 2018-2023

Table 43 □NBO Company Shares of Off-trade Carbonates: % Volume 2019-2023

Table 44 □LBN Brand Shares of Off-trade Carbonates: % Volume 2020-2023

Table 45 □NBO Company Shares of Off-trade Carbonates: % Value 2019-2023

Table 46 □LBN Brand Shares of Off-trade Carbonates: % Value 2020-2023

Table 47 □Forecast Off-trade Sales of Carbonates by Category: Volume 2023-2028

Table 48 □Forecast Off-trade Sales of Carbonates by Category: Value 2023-2028

Table 49 □Forecast Off-trade Sales of Carbonates by Category: % Volume Growth 2023-2028

Table 50 □Forecast Off-trade Sales of Carbonates by Category: % Value Growth 2023-2028

Table 51 □Forecast Sales of Carbonates by Total Fountain On-trade: Volume 2023-2028

Table 52 □Forecast Sales of Carbonates by Total Fountain On-trade: % Volume Growth 2023-2028

JUICE IN NORTH MACEDONIA

KEY DATA FINDINGS

2023 DEVELOPMENTS

Juice benefits from shift away from carbonates

Health and wellness shaping consumption trends

New flavours

PROSPECTS AND OPPORTUNITIES

Further expansion expected

Rising health consciousness driving demand for not from concentrate 100% juice

Contradictory trends

CATEGORY DATA

Table 53 Off-trade Sales of Juice by Category: Volume 2018-2023

Table 54 Off-trade Sales of Juice by Category: Value 2018-2023

Table 55 Off-trade Sales of Juice by Category: % Volume Growth 2018-2023

Table 56 Off-trade Sales of Juice by Category: % Value Growth 2018-2023

Table 57 NBO Company Shares of Off-trade Juice: % Volume 2019-2023

Table 58 LBN Brand Shares of Off-trade Juice: % Volume 2020-2023

Table 59 NBO Company Shares of Off-trade Juice: % Value 2019-2023

Table 60 LBN Brand Shares of Off-trade Juice: % Value 2020-2023

Table 61 Forecast Off-trade Sales of Juice by Category: Volume 2023-2028

Table 62 □Forecast Off-trade Sales of Juice by Category: Value 2023-2028

Table 63 □Forecast Off-trade Sales of Juice by Category: % Volume Growth 2023-2028

Table 64 □Forecast Off-trade Sales of Juice by Category: % Value Growth 2023-2028

BOTTLED WATER IN NORTH MACEDONIA

KEY DATA FINDINGS

2023 DEVELOPMENTS

Health concerns boost demand for bottled water

Functional bottled water puts in strong performance

Sparkling flavoured bottled water would benefit from more high-quality brands

PROSPECTS AND OPPORTUNITIES

Diversification of offer to support growth

Increasing presence of high-quality brands to boost growth categories

Bottled water to benefit from shift away from carbonates and juice

CATEGORY DATA

Table 65 Off-trade Sales of Bottled Water by Category: Volume 2018-2023

Table 66 Off-trade Sales of Bottled Water by Category: Value 2018-2023

Table 67 Off-trade Sales of Bottled Water by Category: % Volume Growth 2018-2023

Table 68 Off-trade Sales of Bottled Water by Category: % Value Growth 2018-2023

Table 69 NBO Company Shares of Off-trade Bottled Water: % Volume 2019-2023

Table 70 LBN Brand Shares of Off-trade Bottled Water: % Volume 2020-2023

Table 71 NBO Company Shares of Off-trade Bottled Water: % Value 2019-2023

Table 72 LBN Brand Shares of Off-trade Bottled Water: % Value 2020-2023

Table 73 Forecast Off-trade Sales of Bottled Water by Category: Volume 2023-2028

Table 74 □Forecast Off-trade Sales of Bottled Water by Category: Value 2023-2028

Table 75 □Forecast Off-trade Sales of Bottled Water by Category: % Volume Growth 2023-2028

Table 76 □Forecast Off-trade Sales of Bottled Water by Category: % Value Growth 2023-2028

SPORTS DRINKS IN NORTH MACEDONIA

KEY DATA FINDINGS

2023 DEVELOPMENTS

Increased participation in regular exercise boosts demand

Vindija remains dominant amidst limited competition

Leading brand introduces new visual identity

PROSPECTS AND OPPORTUNITIES

Health and wellness trend to support continued growth

Leader set to remain dominant

E-commerce has potential to expand consumer base

CATEGORY DATA

Table 77 Off-trade Sales of Sports Drinks: Volume 2018-2023

Table 78 Off-trade Sales of Sports Drinks: Value 2018-2023

Table 79 Off-trade Sales of Sports Drinks: % Volume Growth 2018-2023

Table 80 Off-trade Sales of Sports Drinks: % Value Growth 2018-2023

Table 81 NBO Company Shares of Off-trade Sports Drinks: % Volume 2019-2023

Table 82 LBN Brand Shares of Off-trade Sports Drinks: % Volume 2020-2023

Table 83 NBO Company Shares of Off-trade Sports Drinks: % Value 2019-2023

Table 84 LBN Brand Shares of Off-trade Sports Drinks: % Value 2020-2023

Table 85 Forecast Off-trade Sales of Sports Drinks: Volume 2023-2028

Table 86 □Forecast Off-trade Sales of Sports Drinks: Value 2023-2028

Table 87 □Forecast Off-trade Sales of Sports Drinks: % Volume Growth 2023-2028

Table 88 □Forecast Off-trade Sales of Sports Drinks: % Value Growth 2023-2028

ENERGY DRINKS IN NORTH MACEDONIA

KEY DATA FINDINGS

2023 DEVELOPMENTS

Social activity of younger consumers boosts demand for energy drinks

Red Bull dominates

Smaller rivals offer lower prices

PROSPECTS AND OPPORTUNITIES

Growth despite younger people emigrating

Red Bull to remain dominant

Health and wellness trend to exert a stronger influence

CATEGORY DATA

Table 89 Off-trade Sales of Energy Drinks: Volume 2018-2023

Table 90 Off-trade Sales of Energy Drinks: Value 2018-2023

Table 91 Off-trade Sales of Energy Drinks: % Volume Growth 2018-2023

Table 92 Off-trade Sales of Energy Drinks: % Value Growth 2018-2023

Table 93 NBO Company Shares of Off-trade Energy Drinks: % Volume 2019-2023

Table 94 LBN Brand Shares of Off-trade Energy Drinks: % Volume 2020-2023

Table 95 NBO Company Shares of Off-trade Energy Drinks: % Value 2019-2023

Table 96 LBN Brand Shares of Off-trade Energy Drinks: % Value 2020-2023

Table 97 Forecast Off-trade Sales of Energy Drinks: Volume 2023-2028

Table 98 □Forecast Off-trade Sales of Energy Drinks: Value 2023-2028

Table 99 □Forecast Off-trade Sales of Energy Drinks: % Volume Growth 2023-2028

Table 100 □Forecast Off-trade Sales of Energy Drinks: % Value Growth 2023-2028

CONCENTRATES IN NORTH MACEDONIA

KEY DATA FINDINGS

2023 DEVELOPMENTS

Concentrates sees decline

Waning demand for liquid concentrates

Powder concentrates sees minimal growth

PROSPECTS AND OPPORTUNITIES

Liquid concentrates suffering from shifting consumer preferences

Modest growth ahead for powder concentrates

Little change in competitive landscape anticipated

Concentrates Conversions

Summary 2 Concentrates Conversion Factors for Ready-to-Drink (RTD) Format

CATEGORY DATA

Table 101 Off-trade Sales of Concentrates (RTD) by Category: Volume 2018-2023

Table 102 Off-trade Sales of Concentrates by Category: Value 2018-2023
Table 103 Off-trade Sales of Concentrates (RTD) by Category: % Volume Growth 2018-2023
Table 104 Off-trade Sales of Concentrates by Category: % Value Growth 2018-2023
Table 105 NBO Company Shares of Off-trade Concentrates (RTD): % Volume 2019-2023
Table 106 LBN Brand Shares of Off-trade Concentrates (RTD): % Volume 2020-2023
Table 107 NBO Company Shares of Off-trade Concentrates: % Value 2019-2023
Table 108 LBN Brand Shares of Off-trade Concentrates: % Value 2020-2023
Table 109 NBO Company Shares of Off-trade Liquid Concentrates (RTD): % Volume 2019-2023
Table 110 LBN Brand Shares of Off-trade Liquid Concentrates (RTD): % Volume 2020-2023
Table 111 NBO Company Shares of Off-trade Powder Concentrates (RTD): % Volume 2019-2023
Table 112 LBN Brand Shares of Off-trade Powder Concentrates (RTD): % Volume 2020-2023
Table 113 Forecast Off-trade Sales of Concentrates (RTD) by Category: Volume 2023-2028
Table 114 Forecast Off-trade Sales of Concentrates by Category: Value 2023-2028
Table 115 Forecast Off-trade Sales of Concentrates (RTD) by Category: % Volume Growth 2023-2028
Table 116 Forecast Off-trade Sales of Concentrates by Category: % Value Growth 2023-2028

RTD TEA IN NORTH MACEDONIA

KEY DATA FINDINGS

2023 DEVELOPMENTS

Health and wellness drives shift to reduced sugar RTD tea
Fuze Tea leads off-trade value sales, while Viva Ice Tea tops volume rankings
Limited opportunities for development of carbonated RTD tea

PROSPECTS AND OPPORTUNITIES

Health and convenience factors to have positive impact
Further health driven growth for reduced sugar RTD tea
Expansion of e-commerce

CATEGORY DATA

Table 117 Off-trade Sales of RTD Tea by Category: Volume 2018-2023
Table 118 Off-trade Sales of RTD Tea by Category: Value 2018-2023
Table 119 Off-trade Sales of RTD Tea by Category: % Volume Growth 2018-2023
Table 120 Off-trade Sales of RTD Tea by Category: % Value Growth 2018-2023
Table 121 NBO Company Shares of Off-trade RTD Tea: % Volume 2019-2023
Table 122 LBN Brand Shares of Off-trade RTD Tea: % Volume 2020-2023
Table 123 NBO Company Shares of Off-trade RTD Tea: % Value 2019-2023
Table 124 LBN Brand Shares of Off-trade RTD Tea: % Value 2020-2023
Table 125 Forecast Off-trade Sales of RTD Tea by Category: Volume 2023-2028
Table 126 Forecast Off-trade Sales of RTD Tea by Category: Value 2023-2028
Table 127 Forecast Off-trade Sales of RTD Tea by Category: % Volume Growth 2023-2028
Table 128 Forecast Off-trade Sales of RTD Tea by Category: % Value Growth 2023-2028

RTD COFFEE IN NORTH MACEDONIA

KEY DATA FINDINGS

2023 DEVELOPMENTS

RTD coffee continues to bounce back
Established coffee culture and lack of strong brands act as obstacles to development
Specialist coffee shops and e-commerce leading diversification efforts

PROSPECTS AND OPPORTUNITIES

Positive outlook, with RTD coffee set to remain an impulse purchase
Improvement to the brand offer

Continued expansion of e-commerce

CATEGORY DATA

Table 129 Off-trade Sales of RTD Coffee: Volume 2018-2023

Table 130 Off-trade Sales of RTD Coffee: Value 2018-2023

Table 131 Off-trade Sales of RTD Coffee: % Volume Growth 2018-2023

Table 132 Off-trade Sales of RTD Coffee: % Value Growth 2018-2023

Table 133 NBO Company Shares of Off-trade RTD Coffee: % Volume 2019-2023

Table 134 LBN Brand Shares of Off-trade RTD Coffee: % Volume 2020-2023

Table 135 NBO Company Shares of Off-trade RTD Coffee: % Value 2019-2023

Table 136 LBN Brand Shares of Off-trade RTD Coffee: % Value 2020-2023

Table 137 Forecast Off-trade Sales of RTD Coffee: Volume 2023-2028

Table 138 □Forecast Off-trade Sales of RTD Coffee: Value 2023-2028

Table 139 □Forecast Off-trade Sales of RTD Coffee: % Volume Growth 2023-2028

Table 140 □Forecast Off-trade Sales of RTD Coffee: % Value Growth 2023-2028

Soft Drinks in North Macedonia

Market Direction | 2024-01-16 | 78 pages | Euromonitor

To place an Order with Scotts International:

- Print this form
- Complete the relevant blank fields and sign
- Send as a scanned email to support@scotts-international.com

ORDER FORM:

Select license	License	Price
	Single User Licence	€1750.00
	Multiple User License (1 Site)	€3500.00
	Multiple User License (Global)	€5250.00
		VAT
		Total

*Please circle the relevant license option. For any questions please contact support@scotts-international.com or 0048 603 394 346.

** VAT will be added at 23% for Polish based companies, individuals and EU based companies who are unable to provide a valid EU Vat Numbers.

Email*	Phone*	
First Name*	Last Name*	
Job title*		
Company Name*	EU Vat / Tax ID / NIP number*	
Address*	City*	
Zip Code*	Country*	
	Date	2026-02-09
	Signature	

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com