

## **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.

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: [support@scotts-international.com](mailto:support@scotts-international.com)

[www.scotts-international.com](http://www.scotts-international.com)

## 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

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: [support@scotts-international.com](mailto:support@scotts-international.com)

[www.scotts-international.com](http://www.scotts-international.com)

## 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

**Scotts International. EU Vat number: PL 6772247784**

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

[www.scotts-international.com](http://www.scotts-international.com)

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

**Scotts International. EU Vat number: PL 6772247784**

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

www.scotts-international.com

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

**Scotts International. EU Vat number: PL 6772247784**

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

www.scotts-international.com

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

**Scotts International. EU Vat number: PL 6772247784**

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

www.scotts-international.com

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

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: [support@scotts-international.com](mailto:support@scotts-international.com)

[www.scotts-international.com](http://www.scotts-international.com)

## 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*	<input type="text"/>	Phone*	<input type="text"/>
First Name*	<input type="text"/>	Last Name*	<input type="text"/>
Job title*	<input type="text"/>		
Company Name*	<input type="text"/>	EU Vat / Tax ID / NIP number*	<input type="text"/>
Address*	<input type="text"/>	City*	<input type="text"/>
Zip Code*	<input type="text"/>	Country*	<input type="text"/>
		Date	<input type="text" value="2026-02-09"/>
		Signature	<input type="text"/>

**Scotts International. EU Vat number: PL 6772247784**

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

www.scotts-international.com