

Retailing in Serbia

https://marketpublishers.com/r/R348318FD90EN.html Date: April 2022 Pages: 77 Price: US\$ 2,100.00 (Single User License) ID: R348318FD90EN

Abstracts

Growth in value sales in retailing was slightly lower in 2021 than in 2020, as consumers felt their finances being squeezed due to the fallout of the pandemic and there was also inflationary pressure. All the same, certain retailers performed better than others. For instance, though growth was lower than in 2020, e-commerce and mobile e-commerce continued to post double-digit value growth. Also, though growth was lower for modern grocery retailers in 2021, they continued to steal value share fro...

Euromonitor International's Retailing in Serbia report offers insight into key trends and developments driving the industry. The report examines all retail channels to provide sector insight. Channels include hypermarkets, supermarkets, discounters, convenience stores, mixed retailers, health and beauty retailers, clothing and footwear retailers, furniture and furnishing stores, DIY and hardware stores, durable goods retailers, leisure and personal goods retailers. There are profiles of leading retailers, with analysis of their performance and the challenges they face. There is also analysis of non-store retailing: vending; homeshopping; internet retailing; direct selling, as available.

Product coverage: Non-Store Retailing, Store-Based Retailing.

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

Why buy this report?

Get a detailed picture of the Retailing 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.



Contents

RETAILING IN SERBIA EXECUTIVE SUMMARY Retailing in 2021: The big picture Online space continues to gain value share Modern grocery retailers surpass traditional grocery retailers for first time in terms of value sales What next for retailing? **OPERATING ENVIRONMENT** Informal retailing Opening hours Summary 1 Standard Opening Hours by Channel Type 2021 Physical retail landscape Cash and carry Table 1 Cash and Carry Sales: Value 2016-2021 Seasonality New Year's Eve/Christmas First Day of School Patron Saint Celebration Easter Women's Day Payments Delivery and collections Emerging business models MARKET DATA Table 2 Sales in Retailing by Store-based vs Non-Store: Value 2016-2021 Table 3 Sales in Retailing by Store-based vs Non-Store: % Value Growth 2016-2021 Table 4 Sales in Store-Based Retailing by Channel: Value 2016-2021 Table 5 Sales in Store-Based Retailing by Channel: % Value Growth 2016-2021 Table 6 Store-Based Retailing Outlets by Channel: Units 2016-2021 Table 7 Store-Based Retailing Outlets by Channel: % Unit Growth 2016-2021 Table 8 Sales in Non-Store Retailing by Channel: Value 2016-2021 Table 9 Sales in Non-Store Retailing by Channel: % Value Growth 2016-2021 Table 10 Non-Grocery Specialists: Value Sales, Outlets and Selling Space 2016-2021 Table 11 Non-Grocery Specialists: Value Sales, Outlets and Selling Space: % Growth 2016-2021 Table 12 Sales in Non-Grocery Specialists by Channel: Value 2016-2021 Table 13 Sales in Non-Grocery Specialists by Channel: % Value Growth 2016-2021



Table 14 Non-Grocery Specialists Outlets by Channel: Units 2016-2021 Table 15 Non-Grocery Specialists Outlets by Channel: % Unit Growth 2016-2021 Table 16 Retailing GBO Company Shares: % Value 2017-2021 Table 17 Retailing GBN Brand Shares: % Value 2018-2021 Table 18 Store-based Retailing GBO Company Shares: % Value 2017-2021 Table 19 Store-based Retailing GBN Brand Shares: % Value 2018-2021 Table 20 Store-based Retailing LBN Brand Shares: Outlets 2018-2021 Table 21 Non-Store Retailing GBO Company Shares: % Value 2017-2021 Table 22 Non-Store Retailing GBN Brand Shares: % Value 2018-2021 Table 23 Non-Grocery Specialists GBO Company Shares: % Value 2017-2021 Table 24 Non-Grocery Specialists GBN Brand Shares: % Value 2018-2021 Table 25 Non-Grocery Specialists LBN Brand Shares: Outlets 2018-2021 Table 26 Non-Grocery Specialists LBN Brand Shares: Selling Space 2018-2021 Table 27 Forecast Sales in Retailing by Store-based vs Non-Store: Value 2021-2026 Table 28 Forecast Sales in Retailing by Store-based vs Non-Store: % Value Growth 2021-2026 Table 29 Forecast Sales in Store-Based Retailing by Channel: Value 2021-2026 Table 30 Forecast Sales in Store-Based Retailing by Channel: % Value Growth 2021-2026 Table 31 Forecast Store-Based Retailing Outlets by Channel: Units 2021-2026 Table 32 Forecast Store-Based Retailing Outlets by Channel: % Unit Growth 2021-2026 Table 33 Forecast Sales in Non-Store Retailing by Channel: Value 2021-2026 Table 34 Forecast Sales in Non-Store Retailing by Channel: % Value Growth 2021-2026 Table 35 Non-Grocery Specialists Forecasts: Value Sales, Outlets and Selling Space 2021-2026 Table 36 Non-Grocery Specialists Forecasts: Value Sales, Outlets and Selling Space: % Growth 2021-2026 Table 37 Forecast Sales in Non-Grocery Specialists by Channel: Value 2021-2026 Table 38 Forecast Sales in Non-Grocery Specialists by Channel: % Value Growth 2021-2026 Table 39 Forecast Non-Grocery Specialists Outlets by Channel: Units 2021-2026 Table 40 Forecast Non-Grocery Specialists Outlets by Channel: % Unit Growth 2021-2026 DISCLAIMER SOURCES Summary 2 Research Sources MODERN GROCERY RETAILERS IN SERBIA

KEY DATA FINDINGS



2021 DEVELOPMENTS

Lower value growth than 2020, but still solid Discounter Lidl gains further value share Leading players create goodwill through charitable activities PROSPECTS AND OPPORTUNITIES Healthy constant value growth over forecast period Private label key tool for leading retailers over forecast period Hypermarkets in decline CHANNEL DATA Table 41 Modern Grocery Retailers: Value Sales, Outlets and Selling Space 2016-2021 Table 42 Modern Grocery Retailers: Value Sales, Outlets and Selling Space: % Growth 2016-2021 Table 43 Sales in Modern Grocery Retailers by Channel: Value 2016-2021 Table 44 Sales in Modern Grocery Retailers by Channel: % Value Growth 2016-2021 Table 45 Modern Grocery Retailers Outlets by Channel: Units 2016-2021 Table 46 Modern Grocery Retailers Outlets by Channel: % Unit Growth 2016-2021 Table 47 Modern Grocery Retailers GBO Company Shares: % Value 2017-2021 Table 48 Modern Grocery Retailers GBN Brand Shares: % Value 2018-2021 Table 49 Modern Grocery Retailers LBN Brand Shares: Outlets 2018-2021 Table 50 Modern Grocery Retailers LBN Brand Shares: Selling Space 2018-2021 Table 51 Modern Grocery Retailers Forecasts: Value Sales, Outlets and Selling Space 2021-2026 Table 52 Modern Grocery Retailers Forecasts: Value Sales, Outlets and Selling Space: % Growth 2021-2026 Table 53 Forecast Sales in Modern Grocery Retailers by Channel: Value 2021-2026 Table 54 Forecast Sales in Modern Grocery Retailers by Channel: % Value Growth 2021-2026 Table 55 Forecast Modern Grocery Retailers Outlets by Channel: Units 2021-2026 Table 56 Forecast Modern Grocery Retailers Outlets by Channel: % Unit Growth 2021-2026 TRADITIONAL GROCERY RETAILERS IN SERBIA **KEY DATA FINDINGS** 2021 DEVELOPMENTS Fall in constant value sales in 2021 Futura Plus leads in highly fragmented landscape Private label products from larger retailers being sold in some neighbourhood stores PROSPECTS AND OPPORTUNITIES

Muted outlook over forecast period

Kiosks, bakeries and butchers expected to be unimpacted by the modernisation trend



Degree of market concentration expected over forecast period CHANNEL DATA Table 57 Traditional Grocery Retailers: Value Sales, Outlets and Selling Space 2016-2021 Table 58 Traditional Grocery Retailers: Value Sales, Outlets and Selling Space: % Growth 2016-2021 Table 59 Traditional Grocery Retailers GBO Company Shares: % Value 2017-2021 Table 60 Traditional Grocery Retailers GBN Brand Shares: % Value 2018-2021 Table 61 Traditional Grocery Retailers LBN Brand Shares: Outlets 2018-2021 Table 62 Traditional Grocery Retailers LBN Brand Shares: Selling Space 2018-2021 Table 63 Traditional Grocery Retailers Forecasts: Value Sales, Outlets and Selling Space 2021-2026 Table 64 Traditional Grocery Retailers Forecasts: Value Sales, Outlets and Selling Space: % Growth 2021-2026 APPAREL AND FOOTWEAR SPECIALIST RETAILERS IN SERBIA **KEY DATA FINDINGS** 2021 DEVELOPMENTS Recovery in value sales in 2021 LC Waikiki strengthens its lead thanks to its expansion strategy and accessible pricing Increased offering of loyalty cards PROSPECTS AND OPPORTUNITIES Moderate constant value growth over forecast period E-commerce becomes even more of a focus of the leading players Consolidation over forecast period CHANNEL DATA Table 65 Apparel And Footwear Specialist Retailers: Value Sales, Outlets and Selling Space 2016-2021 Table 66 Apparel And Footwear Specialist Retailers: Value Sales, Outlets and Selling Space: % Growth 2016-2021 Table 67 Apparel And Footwear Specialist Retailers GBO Company Shares: % Value 2017-2021 Table 68 Apparel And Footwear Specialist Retailers GBN Brand Shares: % Value 2018-2021 Table 69 Apparel And Footwear Specialist Retailers LBN Brand Shares: Outlets 2018-2021 Table 70 Apparel And Footwear Specialist Retailers LBN Brand Shares: Selling Space 2018-2021 Table 71 Apparel And Footwear Specialist Retailers Forecasts: Value Sales, Outlets and Selling Space 2021-2026 Retailing in Serbia



Table 72 Apparel And Footwear Specialist Retailers Forecasts: Value Sales, Outlets and Selling Space: % Growth 2021-2026

HEALTH AND BEAUTY SPECIALIST RETAILERS IN SERBIA

KEY DATA FINDINGS

2021 DEVELOPMENTS

Lower value growth in 2021, due to decline in growth of chemists/pharmacies

Apotekarska Ustanova continued to lose value share to its nearest competitors

Rebound for beauty specialist retailers in 2021

PROSPECTS AND OPPORTUNITIES

Moderate growth over forecast period

Optical goods fastest growing channel

Potential growth opportunity for vitamins and dietary supplements speciality retailers CHANNEL DATA

Table 73 Health and Beauty Specialist Retailers: Value Sales, Outlets and Selling Space 2016-2021

Table 74 Health and Beauty Specialist Retailers: Value Sales, Outlets and Selling Space: % Growth 2016-2021

Table 75 Sales in Health and Beauty Specialist Retailers by Channel: Value 2016-2021 Table 76 Sales in Health and Beauty Specialist Retailers by Channel: % Value Growth 2016-2021

Table 77 Health and Beauty Specialist Retailers GBO Company Shares: % Value 2017-2021

Table 78 Health and Beauty Specialist Retailers GBN Brand Shares: % Value2018-2021

Table 79 Health and Beauty Specialist Retailers LBN Brand Shares: Outlets 2018-2021 Table 80 Health and Beauty Specialist Retailers LBN Brand Shares: Selling Space 2018-2021

Table 81 Health and Beauty Specialist Retailers Forecasts: Value Sales, Outlets and Selling Space 2021-2026

Table 82 Health and Beauty Specialist Retailers Forecasts: Value Sales, Outlets and Selling Space: % Growth 2021-2026

Table 83 Forecast Sales in Health and Beauty Specialist Retailers by Channel: Value2021-2026

Table 84 Forecast Sales in Health and Beauty Specialist Retailers by Channel: % Value Growth 2021-2026

MIXED RETAILERS IN SERBIA

KEY DATA FINDINGS

2021 DEVELOPMENTS

Modest recovery in 2021



Department stores, mass merchandisers and warehouse clubs remain non-existent in Serbia Studio Moderna intensifies its discounting of brand Top Shop PROSPECTS AND OPPORTUNITIES Sluggish growth over forecast period Variety stores appeals to cash-strapped consumers Other formats unlikely to appear in Serbia CHANNEL DATA Table 85 Mixed Retailers: Value Sales, Outlets and Selling Space 2016-2021 Table 86 Mixed Retailers: Value Sales, Outlets and Selling Space: % Growth 2016-2021 Table 87 Sales in Mixed Retailers by Channel: Value 2016-2021 Table 88 Sales in Mixed Retailers by Channel: % Value Growth 2016-2021 Table 89 Mixed Retailers Outlets by Channel: Units 2016-2021 Table 90 Mixed Retailers Outlets by Channel: % Unit Growth 2016-2021 Table 91 Mixed Retailers GBO Company Shares: % Value 2017-2021 Table 92 Mixed Retailers GBN Brand Shares: % Value 2018-2021 Table 93 Mixed Retailers LBN Brand Shares: Outlets 2018-2021 Table 94 Mixed Retailers LBN Brand Shares: Selling Space 2018-2021 Table 95 Mixed Retailers Forecasts: Value Sales, Outlets and Selling Space 2021-2026 Table 96 Mixed Retailers Forecasts: Value Sales, Outlets and Selling Space: % Growth 2021-2026 Table 97 Forecast Sales in Mixed Retailers by Channel: Value 2021-2026 Table 98 Forecast Sales in Mixed Retailers by Channel: % Value Growth 2021-2026 Table 99 Forecast Mixed Retailers Outlets by Channel: Units 2021-2026 Table 100 Forecast Mixed Retailers Outlets by Channel: % Unit Growth 2021-2026 DIRECT SELLING IN SERBIA **KEY DATA FINDINGS** 2021 DEVELOPMENTS Recovery after severe drop in value sales during 2020 lockdowns. Bigger players lose value share to smaller players in 2021 Changes in society means job more difficult for direct sellers PROSPECTS AND OPPORTUNITIES Healthy constant value growth over forecast period E-commerce a growing threat to direct selling No significant new player over forecast period CHANNEL DATA Table 101 Direct Selling by Category: Value 2016-2021 Table 102 Direct Selling by Category: % Value Growth 2016-2021



Table 103 Direct Selling GBO Company Shares: % Value 2017-2021 Table 104 Direct Selling GBN Brand Shares: % Value 2018-2021 Table 105 Direct Selling Forecasts by Category: Value 2021-2026 Table 106 Direct Selling Forecasts by Category: % Value Growth 2021-2026 E-COMMERCE (GOODS) IN SERBIA **KEY DATA FINDINGS** 2021 DEVELOPMENTS Continued strong growth in 2021 Wider availability of internet and development of payment infrastructure leading to increased sales Delivery platforms benefitting from increased e-commerce PROSPECTS AND OPPORTUNITIES Rosey outlook over forecast period Resistance from older generations and cost of broadband challenges the expansion of ecommerce Retailers focus on generating sales via e-commerce CHANNEL DATA Table 107 E-Commerce (Goods) by Channel and Category: Value 2016-2021 Table 108 E-Commerce (Goods) by Channel and Category: % Value Growth 2016-2021 Table 109 E-Commerce (Goods) GBO Company Shares: % Value 2017-2021 Table 110 E-Commerce (Goods) GBN Brand Shares: % Value 2018-2021 Table 111 Forecast E-Commerce (Goods) by Channel and Category: Value 2021-2026 Table 112 Forecast E-Commerce (Goods) by Channel and Category: % Value Growth 2021-2026 MOBILE E-COMMERCE (GOODS) IN SERBIA **KEY DATA FINDINGS** 2021 DEVELOPMENTS Continued strong growth in 2021 Increasing number of proprietary apps Next step is development in mobile wallets PROSPECTS AND OPPORTUNITIES Fastest growing retail channel over forecast period Domestic players need to improve the mobile experience Incentivise customers to use mobile payments CHANNEL DATA Table 113 Mobile E-Commerce (Goods): Value 2016-2021 Table 114 Mobile E-Commerce (Goods): % Value Growth 2016-2021 Table 115 Mobile E-Commerce (Goods) Forecasts: Value 2021-2026 Table 116 Mobile E-Commerce (Goods) Forecasts: % Value Growth 2021-2026



I would like to order

Product name: Retailing in Serbia

Product link: <u>https://marketpublishers.com/r/R348318FD90EN.html</u>

Price: US\$ 2,100.00 (Single User License / Electronic Delivery) If you want to order Corporate License or Hard Copy, please, contact our Customer Service: <u>info@marketpublishers.com</u>

Payment

To pay by Credit Card (Visa, MasterCard, American Express, PayPal), please, click button on product page <u>https://marketpublishers.com/r/R348318FD90EN.html</u>

To pay by Wire Transfer, please, fill in your contact details in the form below:

First name: Last name: Email: Company: Address: City: Zip code: Country: Tel: Fax: Your message:

**All fields are required

Custumer signature _____

Please, note that by ordering from marketpublishers.com you are agreeing to our Terms & Conditions at <u>https://marketpublishers.com/docs/terms.html</u>

To place an order via fax simply print this form, fill in the information below and fax the completed form to +44 20 7900 3970