



# Bottled Water in North Macedonia

December 2025

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## Bottled Water in North Macedonia - Category analysis

### KEY DATA FINDINGS

#### 2025 DEVELOPMENTS

Flavoured bottled water increasingly popular

#### INDUSTRY PERFORMANCE

Positive performance in 2025

Still flavoured bottled water gains most volume share

#### WHAT'S NEXT?

Similar dynamics over forecast period

Functional bottled water also register volume growth, with messaging also focusing on quality

Higher extraction charges leads to price rises

#### COMPETITIVE LANDSCAPE

Kozuvchanka continues to have commanding lead

Large influx of new companies

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Small local grocers continue to dominate

Volume sales sizeable through foodservice

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A shift to healthier soft drinks

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Muted picture in 2025

Continuing price sensitivity

Health and wellness claims enter the mainstream

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Muted outlook over forecast period

Opportunities to add value

Both winners and losers

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