



# Passport

## Concentrates in Estonia

Euromonitor International

January 2021

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# CONCENTRATES IN ESTONIA - CATEGORY ANALYSIS

## KEY DATA FINDINGS

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## 2020 IMPACT

Concentrates sees some volume and current value growth thanks to greater at-home consumption during lockdown

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Health and wellness and convenience trends limit growth in 2020

Content removed from sample

Strong local positioning ensures Orkla Eesti remains in pole position as Rongu Mahlrad plays catch up

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## RECOVERY AND OPPORTUNITIES

Powder concentrates faces stiff competition from other soft drinks, but liquid concentrates may get A boost from new Ikea opening

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Gloomy outlook for concentrates as unhealthy profile stifles innovation and growth

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New product developments within powder concentrates may enable smaller players to grab share

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## CATEGORY DATA

Concentrates Conversions

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**Summary 1 Concentrates Conversion Factors for Ready-to-Drink (RTD) Format**

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Source: Euromonitor International

**Table 1 Off-trade Sales of Concentrates (RTD) by Category: Volume 2015-2020**

'000 litres	2015	2016	2017	2018	2019	2020
Liquid Concentrates	<b>Data removed from sample</b>					
Powder Concentrates						
Concentrates						

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

**Table 2 Off-trade Sales of Concentrates by Category: Value 2015-2020**

EUR '000	2015	2016	2017	2018	2019	2020
Liquid Concentrates	<b>Data removed from sample</b>					
Powder Concentrates						
Concentrates						

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

**Table 3 Off-trade Sales of Concentrates (RTD) by Category: % Volume Growth 2015-2020**

% volume growth	2019/20	2015-20 CAGR	2015/20 Total
Liquid Concentrates	<b>Data removed from sample</b>		
Powder Concentrates			
Concentrates			

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

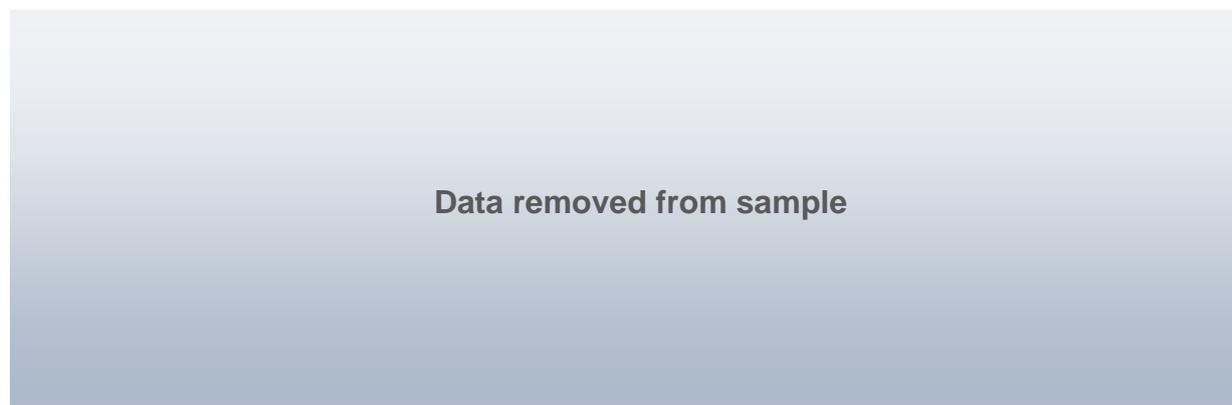
**Table 4 Off-trade Sales of Concentrates by Category: % Value Growth 2015-2020**

% current value growth	2019/20	2015-20 CAGR	2015/20 Total
Liquid Concentrates	<b>Data removed from sample</b>		
Powder Concentrates			
Concentrates			

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

**Table 5 NBO Company Shares of Off-trade Concentrates (RTD): % Volume 2016-2020**

% off-trade volume Company	2016	2017	2018	2019	2020
-------------------------------	------	------	------	------	------



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

**Table 6 LBN Brand Shares of Off-trade Concentrates (RTD): % Volume 2017-2020**

% off-trade volume Brand (GBO)	Company (NBO)	2017	2018	2019	2020
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Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

**Table 7 Forecast Off-trade Sales of Concentrates (RTD) by Category: Volume 2020-2025**

'000 litres	2020	2021	2022	2023	2024	2025
Liquid Concentrates	<b>Data removed from sample</b>					
Powder Concentrates						
Concentrates						

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

**Table 8 Forecast Off-trade Sales of Concentrates by Category: Value 2020-2025**

EUR '000	2020	2021	2022	2023	2024	2025
Liquid Concentrates	<b>Data removed from sample</b>					
Powder Concentrates						
Concentrates						

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

**Table 9 NBO Company Shares of Off-trade Concentrates: % Value 2016-2020**

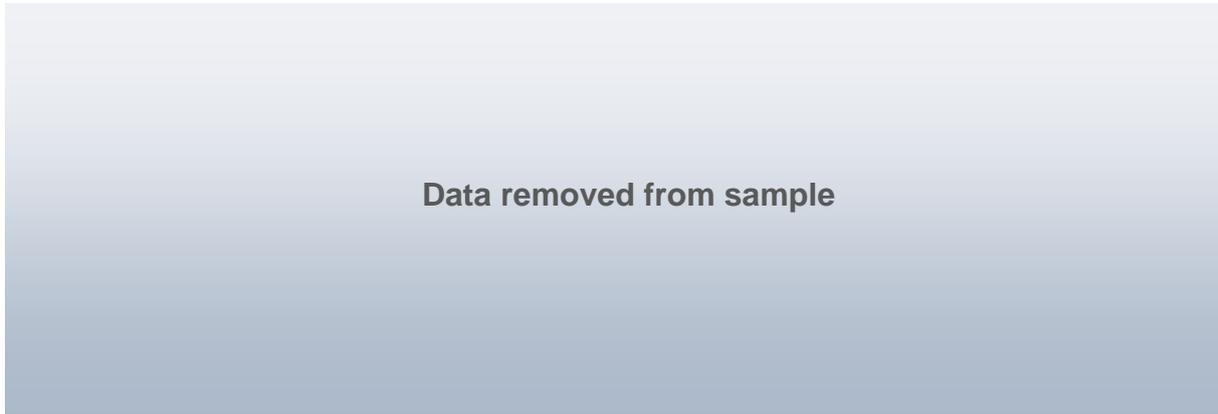
% off-trade value rsp	2016	2017	2018	2019	2020
Company	<b>Data removed from sample</b>				

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

**Table 10 LBN Brand Shares of Off-trade Concentrates: % Value 2017-2020**

% off-trade value rsp

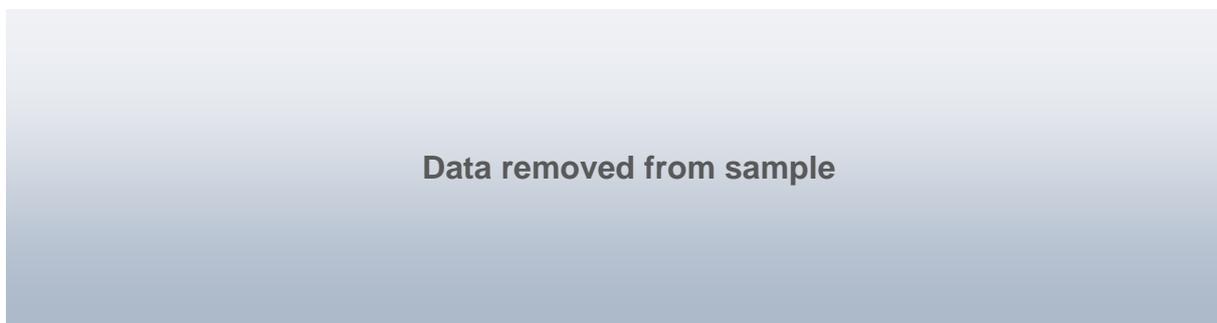
Brand (GBO)	Company (NBO)	2017	2018	2019	2020
-------------	---------------	------	------	------	------



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

**Table 11** NBO Company Shares of Off-trade Liquid Concentrates (RTD): % Volume 2016-2020

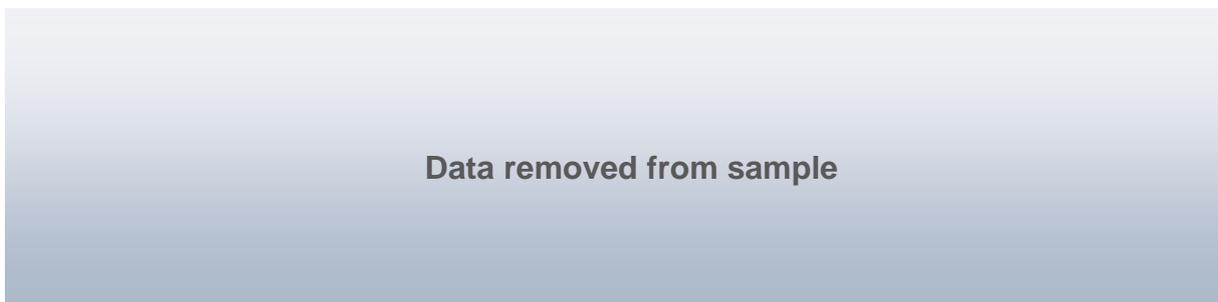
% off-trade volume Company	2016	2017	2018	2019	2020
-------------------------------	------	------	------	------	------



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

**Table 12** LBN Brand Shares of Off-trade Liquid Concentrates (RTD): % Volume 2017-2020

% off-trade volume Brand (GBO)	Company (NBO)	2017	2018	2019	2020
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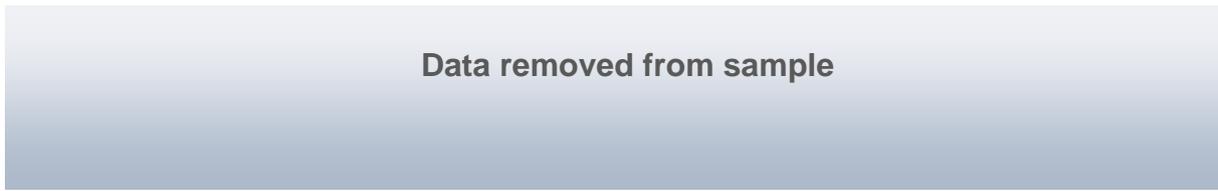




Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

**Table 13** NBO Company Shares of Off-trade Powder Concentrates (RTD): % Volume 2016-2020

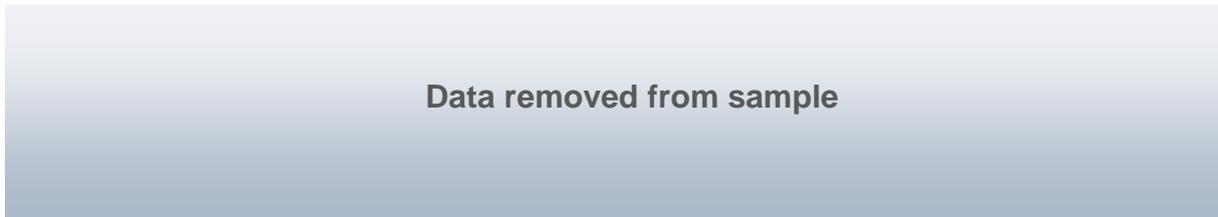
% off-trade volume Company	2016	2017	2018	2019	2020
-------------------------------	------	------	------	------	------



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

**Table 14** LBN Brand Shares of Off-trade Powder Concentrates (RTD): % Volume 2017-2020

% off-trade volume Brand (GBO)	Company (NBO)	2017	2018	2019	2020
-----------------------------------	---------------	------	------	------	------



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

**Table 15** Forecast Off-trade Sales of Concentrates (RTD) by Category: Volume 2020-2025

million litres

	2020	2021	2022	2023	2024	2025
Liquid Concentrates	<b>Data removed from sample</b>					
Powder Concentrates						
Concentrates						

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

**Table 16** Forecast Off-trade Sales of Concentrates by Category: Value 2020-2025

EUR million

	2020	2021	2022	2023	2024	2025
Liquid Concentrates	<b>Data removed from sample</b>					
Powder Concentrates						
Concentrates						

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

**Table 17** Forecast Off-trade Sales of Concentrates (RTD) by Category: % Volume Growth 2020-2025

% volume growth

	2020/21	2020-25 CAGR	2020/25 Total
Liquid Concentrates	<b>Data removed from sample</b>		
Powder Concentrates			
Concentrates			

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

**Table 18** Forecast Off-trade Sales of Concentrates by Category: % Value Growth 2020-2025

% constant value growth

	2020/2021	2020-25 CAGR	2020/25 Total
Liquid Concentrates	<b>Data removed from sample</b>		
Powder Concentrates			
Concentrates			

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

# SOFT DRINKS IN ESTONIA - INDUSTRY OVERVIEW

## EXECUTIVE SUMMARY

### COVID-19 impact on soft drinks

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### COVID-19 country impact

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## Company response

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## Retailing shift

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## Foodservice vs retail split

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## What next for soft drinks?

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**MARKET DATA**

**Table 19** Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: Volume 2015-2020

million litres

	2015	2016	2017	2018	2019	2020
Off-trade	<b>Data removed from sample</b>					
On-trade						
Total						

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

**Table 20** Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: % Volume Growth 2015-2020

% volume growth

	2019/20	2015-20 CAGR	2015/20 Total
Off-trade	<b>Data removed from sample</b>		
On-trade			
Total			

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

**Table 21** Off-trade vs On-trade Sales of Soft Drinks by Channel: Value 2015-2020

EUR million

	2015	2016	2017	2018	2019	2020
Off-trade	<b>Data removed from sample</b>					
On-trade						
Total						

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

**Table 22** Off-trade vs On-trade Sales of Soft Drinks by Channel: % Value Growth 2015-2020

% constant value growth

	2019/20	2015-20 CAGR	2015/20 Total
Off-trade	<b>Data removed from sample</b>		
On-trade			

**Data removed from sample**

**Total**

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

**Table 23 Off-trade vs On-trade Sales of Soft Drinks (as sold) by Category: Volume 2019**

million litres

	Off-trade	On-trade	Total
Bottled Water	<b>Data removed from sample</b>		
Carbonates			
Concentrates			
Juice			
RTD Coffee			
RTD Tea			
Energy Drinks			
Sports Drinks			
Asian Speciality Drinks			
Soft Drinks			

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

Note: Excludes powder concentrates

**Table 24 Off-trade vs On-trade Sales of Soft Drinks (as sold) by Category: % Volume 2019**

% volume analysis

	Off-trade	On-trade	Total
Bottled Water	<b>Data removed from sample</b>		
Carbonates			
Concentrates			
Juice			
RTD Coffee			
RTD Tea			
Energy Drinks			
Sports Drinks			
Asian Speciality Drinks			
Soft Drinks			

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

Note: Excludes powder concentrates

**Table 25 Off-trade vs On-trade Sales of Soft Drinks by Category: Value 2019**

EUR million

	Off-trade	On-trade	Total
Bottled Water	<b>Data removed from sample</b>		
Carbonates			
Concentrates			
Juice			
RTD Coffee			
RTD Tea			
Energy Drinks			

Sports Drinks  
Asian Speciality Drinks  
Soft Drinks

**Data removed from sample**

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

**Table 26 Off-trade vs On-trade Sales of Soft Drinks by Category: % Value 2019**

% value analysis

	Off-trade	On-trade	Total
Bottled Water	<b>Data removed from sample</b>		
Carbonates			
Concentrates			
Juice			
RTD Coffee			
RTD Tea			
Energy Drinks			
Sports Drinks			
Asian Speciality Drinks			
Soft Drinks			

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

**Table 27 Off-trade Sales of Soft Drinks (RTD) by Category: Volume 2015-2020**

million litres

	2015	2016	2017	2018	2019	2020
Bottled Water	<b>Data removed from sample</b>					
Carbonates						
Concentrates						
Juice						
RTD Coffee						
RTD Tea						
Energy Drinks						
Sports Drinks						
Asian Speciality Drinks						
Soft Drinks						

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

**Table 28 Off-trade Sales of Soft Drinks (RTD) by Category: % Volume Growth 2015-2020**

% volume growth

	2019/20	2015-20 CAGR	2015/20 Total
Bottled Water	<b>Data removed from sample</b>		
Carbonates			
Concentrates			
Juice			
RTD Coffee			
RTD Tea			
Energy Drinks			
Sports Drinks			

Asian Speciality Drinks  
Soft Drinks

**Data removed from sample**

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

**Table 29 Off-trade Sales of Soft Drinks by Category: Value 2015-2020**

EUR million

	2015	2016	2017	2018	2019	2020
Bottled Water	<b>Data removed from sample</b>					
Carbonates						
Concentrates						
Juice						
RTD Coffee						
RTD Tea						
Energy Drinks						
Sports Drinks						
Asian Speciality Drinks						
Soft Drinks						

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

**Table 30 Off-trade Sales of Soft Drinks by Category: % Value Growth 2015-2020**

% current value growth

	2019/20	2015-20 CAGR	2015/20 Total
Bottled Water	<b>Data removed from sample</b>		
Carbonates			
Concentrates			
Juice			
RTD Coffee			
RTD Tea			
Energy Drinks			
Sports Drinks			
Asian Speciality Drinks			
Soft Drinks			

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

**Table 31 Sales of Soft Drinks by Total Fountain On-trade: Volume 2015-2020**

million litres

	2015	2016	2017	2018	2019	2020
Total Fountain On-trade	<b>Data removed from sample</b>					

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

**Table 32 Sales of Soft Drinks by Total Fountain On-trade: % Volume Growth 2015-2020**

% fountain volume growth

	2019/20	2015-20 CAGR	2015/20 Total
Total Fountain On-trade	<b>Data removed from sample</b>		

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

**Table 33 NBO Company Shares of Off-trade Soft Drinks (RTD): % Volume 2016-2020**

% off-trade volume Company	2016	2017	2018	2019	2020
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<b>Data removed from sample</b>					
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Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

**Table 34 LBN Brand Shares of Off-trade Soft Drinks (RTD): % Volume 2017-2020**

% off-trade volume Brand (GBO)	Company (NBO)	2017	2018	2019	2020
-----------------------------------	---------------	------	------	------	------

<b>Data removed from sample</b>					
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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 35 NBO Company Shares of Off-trade Soft Drinks: % Value 2016-2020**

% off-trade value rsp Company	2016	2017	2018	2019	2020
<b>Data removed from sample</b>					

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

**Table 36 LBN Brand Shares of Off-trade Soft Drinks: % Value 2017-2020**

% off-trade value rsp Brand (GBO)	Company (NBO)	2017	2018	2019	2020
<b>Data removed from sample</b>					

**Data removed from sample**

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

**Table 37 Penetration of Private Label in Off-trade Soft Drinks (RTD) by Category: % Volume 2015-2020**

% retail rtd volume	2015	2016	2017	2018	2019	2020
Bottled Water	<b>Data removed from sample</b>					
Carbonates						
Concentrates						
Juice						
RTD Tea						
Soft Drinks						

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

**Table 38 Penetration of Private Label in Off-trade Soft Drinks by Category: % Value 2015-2020**

% retail value rsp	2015	2016	2017	2018	2019	2020
Bottled Water	<b>Data removed from sample</b>					
Carbonates						
Concentrates						
Juice						
RTD Tea						
Soft Drinks						

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

**Table 39 Distribution of Off-trade Soft Drinks (as sold) by Format: % Volume 2015-2020**

% off-trade	2015	2016	2017	2018	2019	2020
Store-Based Retailing	<b>Data removed from sample</b>					
- 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						
- Mixed Retailers						
- Non-Grocery Specialists						
Non-Store Retailing						
- Vending						
- Homeshopping						

- E-Commerce
- Direct Selling
- Total

**Data removed from sample**

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

**Table 40 Distribution of Off-trade Soft Drinks (as sold) by Format and Category: % Volume 2020**

% off-trade

	BW	CB	CN	JU	RTDC	RTDT
Store-Based Retailing	<b>Data removed from sample</b>					
- 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						
- Mixed Retailers						
- Non-Grocery Specialists						
Non-Store Retailing						
- Vending						
- Homeshopping						
- E-Commerce						
- Direct Selling						
Total						
	ED	SPD	ASD			
Store-Based Retailing	<b>Data removed from sample</b>					
- 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						
- Mixed Retailers						
- Non-Grocery Specialists						

Non-Store Retailing  
 - Vending  
 - Homeshopping  
 - E-Commerce  
 - Direct Selling  
 Total

**Data removed from sample**

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources  
 Key: BW = bottled water; CB = carbonates; CN = concentrates; JU = juice; RTDC = RTD coffee; RTDT = RTD tea; ED = energy drinks; SPD = sports drinks; ASD = Asian speciality drinks  
 Note: Excludes powder concentrates

**Table 41 Forecast Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: Volume 2020-2025**

million litres

	2020	2021	2022	2023	2024	2025
Off-trade	<b>Data removed from sample</b>					
On-trade						
Total						

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

**Table 42 Forecast Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: % Volume Growth 2020-2025**

% volume growth

	2020/21	2020-25 CAGR	2020/25 Total
Off-trade	<b>Data removed from sample</b>		
On-trade			
Total			

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

**Table 43 Forecast Off-trade vs On-trade Sales of Soft Drinks by Channel: Value 2020-2025**

EUR million

	2020	2021	2022	2023	2024	2025
Off-trade	<b>Data removed from sample</b>					
On-trade						
Total						

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

**Table 44 Forecast Off-trade vs On-trade Sales of Soft Drinks by Channel: % Value Growth 2020-2025**

% constant value growth

	2020/21	2020-25 CAGR	2020/25 Total
Off-trade	<b>Data removed from sample</b>		
On-trade			
Total			

Off-trade  
On-trade  
Total

**Data removed from sample**

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

**Table 45 Forecast Off-trade Sales of Soft Drinks (RTD) by Category: Volume 2020-2025**

million litres

	2020	2021	2022	2023	2024	2025
Bottled Water	<b>Data removed from sample</b>					
Carbonates						
Concentrates						
Juice						
RTD Coffee						
RTD Tea						
Energy Drinks						
Sports Drinks						
Asian Speciality Drinks						
Soft Drinks						

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

**Table 46 Forecast Off-trade Sales of Soft Drinks (RTD) by Category: % Volume Growth 2020-2025**

% volume growth

	2020/21	2020-25 CAGR	2020/25 Total
Bottled Water	<b>Data removed from sample</b>		
Carbonates			
Concentrates			
Juice			
RTD Coffee			
RTD Tea			
Energy Drinks			
Sports Drinks			
Asian Speciality Drinks			
Soft Drinks			

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

**Table 47 Forecast Off-trade Sales of Soft Drinks by Category: Value 2020-2025**

EUR million

	2020	2021	2022	2023	2024	2025
Bottled Water	<b>Data removed from sample</b>					
Carbonates						
Concentrates						
Juice						
RTD Coffee						
RTD Tea						
Energy Drinks						

Sports Drinks  
Asian Speciality Drinks  
Soft Drinks

**Data removed from sample**

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

**Table 48 Forecast Off-trade Sales of Soft Drinks by Category: % Value Growth 2020-2025**

% constant value growth

2020/2021 2020-25 CAGR 2020/25 Total

Bottled Water  
Carbonates  
Concentrates  
Juice  
RTD Coffee  
RTD Tea  
Energy Drinks  
Sports Drinks  
Asian Speciality Drinks  
Soft Drinks

**Data removed from sample**

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

**Table 49 Forecast Sales of Soft Drinks by Total Fountain On-trade: Volume 2020-2025**

million litres

2020 2021 2022 2023 2024 2025

Total Fountain On-trade

**Data removed from sample**

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

**Table 50 Forecast Sales of Soft Drinks by Total Fountain On-trade: % Volume Growth 2020-2025**

% fountain volume growth

2020/21 2020-25 CAGR 2020/25 Total

Total Fountain On-trade

**Data removed from sample**

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

**GLOBAL MACROECONOMIC ENVIRONMENT**

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## GLOBAL INDUSTRY ENVIRONMENT

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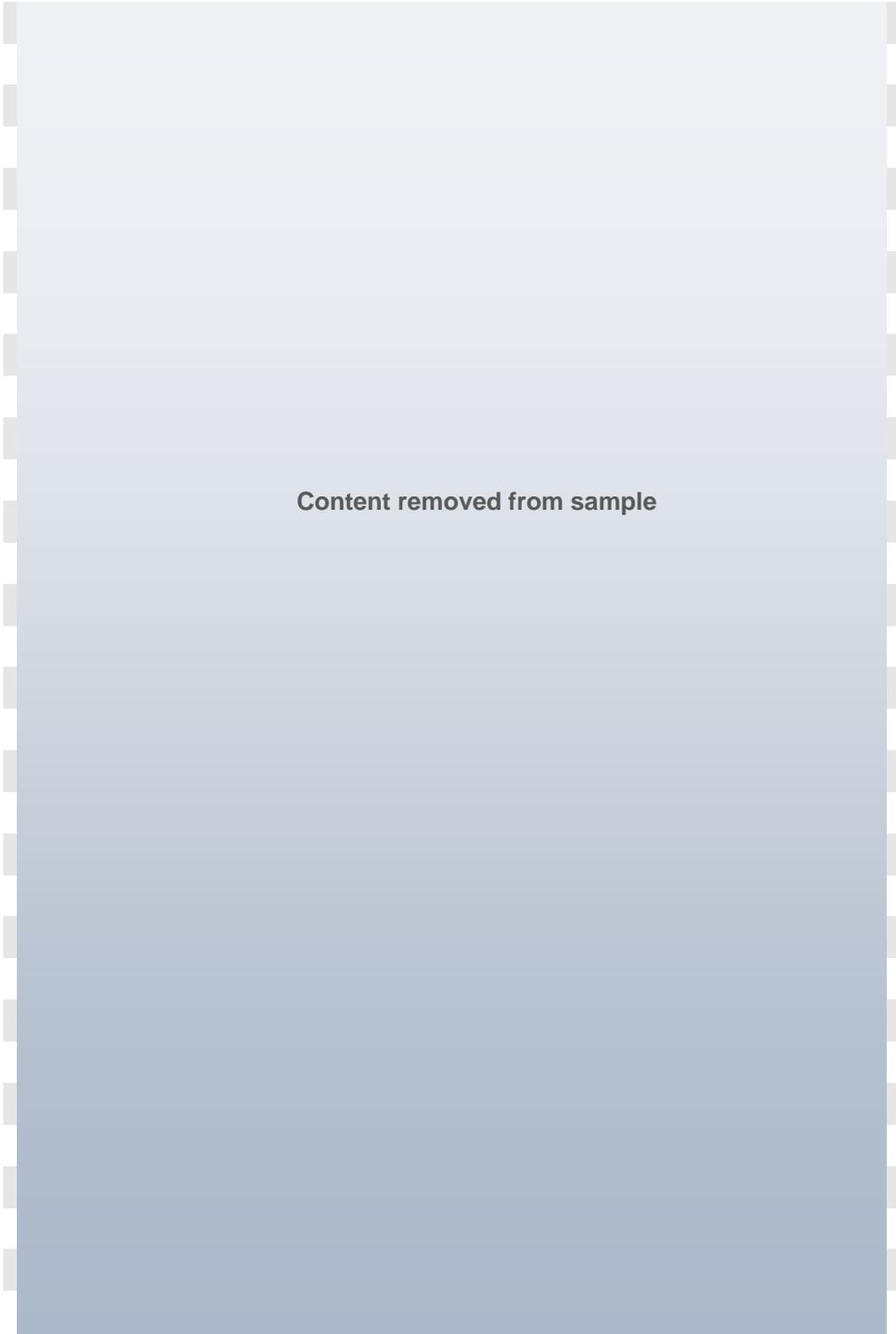
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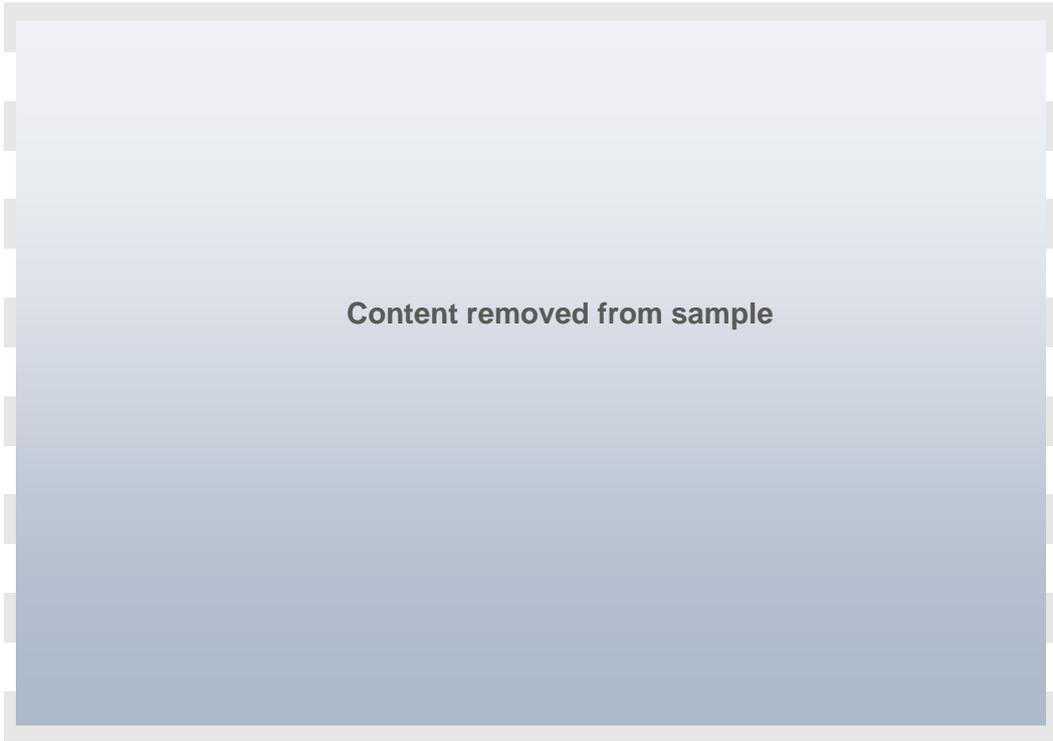
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## SOURCES

Sources used during the research included the following:

Summary 2    Research Sources





Source: Euromonitor International