



Passport

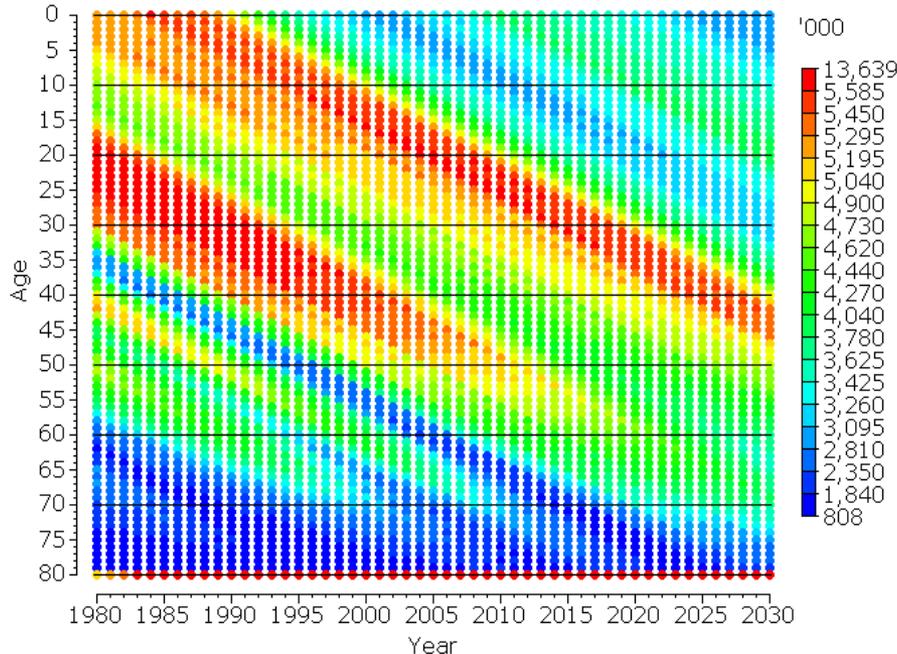
EASTERN EUROPE IN 2030: THE FUTURE DEMOGRAPHIC

March 2012

Population Past, Present and Future

Age Structure of the Population at a Glance: 1980-2030

(Each dot represents a single-year age group)



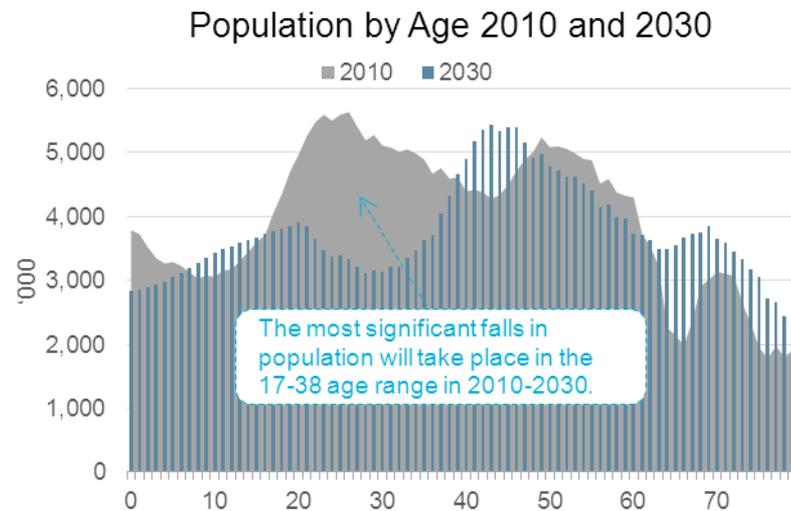
Source: Euromonitor International from national statistics/UN

Reading the chart: This "heat chart" depicts changes in the age structure of the population over time. Each dot represents the number of people in a specific (single year) age group in a given year. Accordingly, a dark red dot shows the largest concentration of people, by age, in a particular year while deep blue dots refer to the lowest concentrations. The areas of red therefore represent a large potential market in demographic terms.

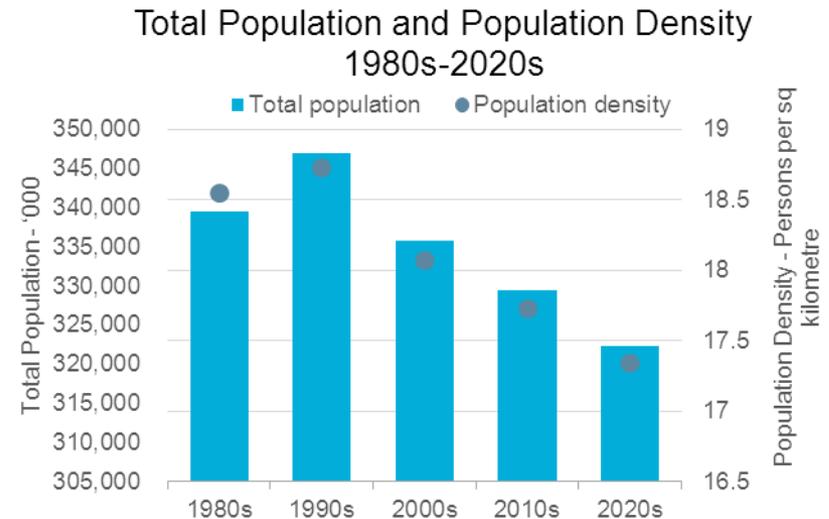
- In 2030, the population of Eastern Europe will reach 316 million, a decrease of 4.7% from 2010. The population aged 62-80+ years will grow by 32.4% or 17.9 million.
- The most populous age group in 2030 will lie in the 41-47 age range, as shown by the dark orange/ red hotspot on the heat chart. There will be 37.3 million people in this age range in 2030, making up 11.8% of the region's total population.
- The largest decline in population in 2010-2030 will occur in the age range 17-38. This group will fall by 33.2 million, a 29.9% drop.
- The size of the child population aged 0-6 years will shrink by 14.4% over the 2010-2030. There will also be a smaller decline in the population aged 48-61 which will decrease by 7.3% over the forecast period.
- As the baby boomer generation hits retirement in 2010-2030 the population will age rapidly. This is compounded somewhat by a falling birth rate and increasing life expectancy.

Population Shift

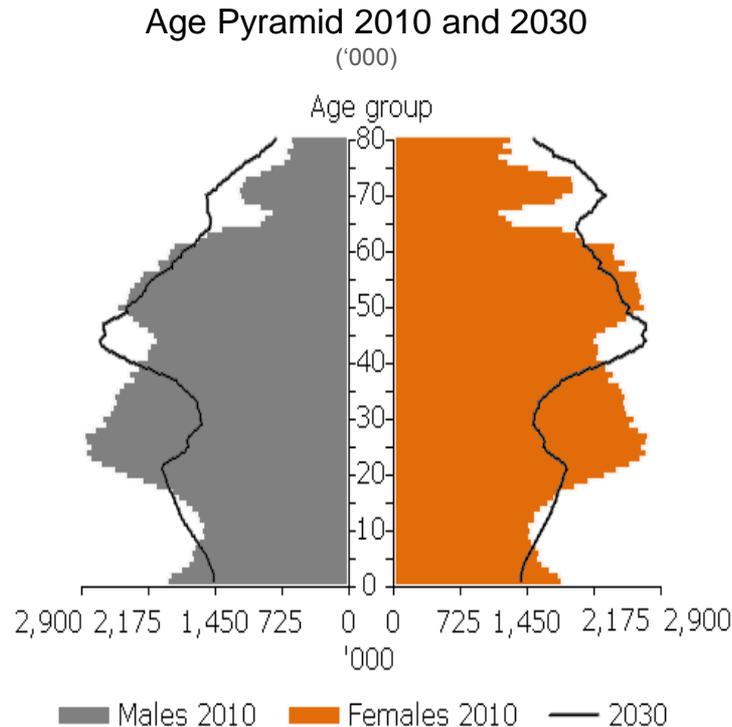
- Total population in Eastern Europe has been decreasing at an increasing pace since the early 1990s when the average annual growth rate for the decade was -0.2%. In the future the speed of decline will fluctuate and the average annual growth rate will be -0.3% in 2020-2030, compared with -0.2% in 2010-2020.
- The population peaked in 1991 at nearly 350 million, however, by 2030 it is expected to have dropped to 316 million. According to the UN, the population of Eastern Europe will have declined even further by 2100.
- Those aged 17-38 years will experience the most significant decreases in population over 2010-2030, falling by 29.9% to total 78.0 million people in 2030.
- As the population shrinks population density in Eastern Europe will fall from 17.9 persons per square kilometre to 17.0 in 2030.



Source: Euromonitor International from national statistics/UN



Men and Women in Eastern Europe



Source: Euromonitor International from national statistics/UN

- The population pyramid base for 2030 tapers at the bottom due to a falling birth rate while the top is fuller to reflect the ageing baby boomer generation.
- 20-29 year olds were the dominant 10-year age group for both men and women in 2010. In 2030 the dominant 10-year age groups for both men and women will be aged 40-49 years due to the natural ageing process.
- The median age of men will be 41.2 years in 2030, a 5.5 year increase over 2010. The median age of women will be 46.1 years in 2030, a 5.2 year increase from 2010.
- In 2030, men will outnumber women in all age groups under 42 years. For those aged 42 years and over the reverse will be true and the gap will widen with age. Women over 65 years will outnumber men of the same age by 16.8 million or 73.6% in 2030. In the 80+ age group there will be more than two women to every man in 2030.
- In 2010 the average life expectancy for women was 77.6 years, this was 7.6 years higher than for men. The gap in life expectancy will close slightly to 6.5 years in 2030 when women will have an average life expectancy at birth of 80.6. Females tend to adopt a more healthy lifestyle than males and have fewer job-related illnesses.

Population by City

'000	2000	2005	2010	2015	2020	2025	2030
Moscow, Russia	10,123	10,716	11,514	12,258	12,843	13,283	13,610
St Petersburg, Russia	4,688	4,656	4,849	5,057	5,227	5,358	5,457
Kiev, Ukraine	2,617	2,646	2,771	2,914	3,022	3,099	3,145
Bucharest, Romania	1,936	1,927	1,944	1,961	1,992	2,031	2,073
Minsk, Belarus	1,691	1,760	1,848	1,922	1,972	2,002	2,011
Warsaw, Poland	1,673	1,700	1,717	1,744	1,778	1,813	1,848
Budapest, Hungary	1,800	1,697	1,724	1,768	1,801	1,825	1,841
Novosibirsk, Russia	1,424	1,427	1,474	1,524	1,567	1,600	1,625
Yekaterinburg, Russia	1,298	1,295	1,350	1,409	1,458	1,495	1,523
Kharkov, Ukraine	1,487	1,438	1,443	1,464	1,479	1,487	1,487
Total urban population	227,769	224,057	223,823	224,969	226,871	228,777	230,348
Total population	341,229	334,683	331,686	329,191	326,295	321,976	316,158

Source: Euromonitor International from national statistics