



Bottled Water in Slovakia

December 2025

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Bottled Water in Slovakia - Category analysis

KEY DATA FINDINGS

2025 DEVELOPMENTS

Sugar tax shock, weaker summer and cautious households reshape bottled water consumption

INDUSTRY PERFORMANCE

Bottled water declines less sharply as affordability and neutrality support everyday hydration

Carbonated mineral water benefits from local tradition, mineral cues and competitive pricing

WHAT'S NEXT?

Climate pressures, health awareness and source diversification to support gradual volume recovery

Functional waters and sugar-free innovations gain momentum under tighter fiscal rules

Fiscal tightening and water policy debates reinforce the strategic role of packaged water

COMPETITIVE LANDSCAPE

Budis builds leadership on aggressive pricing, strong branding and sports partnerships

Minerálne Vody leverages dual-brand portfolio and promotions to capture price-conscious shoppers

CHANNELS

Supermarkets strengthen their role as the main hub for bulk and family bottled water purchases

Discounters gain share as large packs and sharp pricing attract cost-conscious households

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Soft Drinks in Slovakia - Industry Overview

EXECUTIVE SUMMARY

Soft drinks struggle under taxation pressure and subdued consumer sentiment

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INDUSTRY PERFORMANCE

Health-driven reformulation gains visibility but is constrained by uniform taxation

Rising competition from non-alcoholic beer limits soft drinks recovery

Energy drinks remain resilient despite economic pressure and rising competition

WHAT'S NEXT?

Soft drinks to face constrained volume recovery amid intensifying cross-category competition

Premiumisation to accelerate as consumers seek healthier and cleaner formulations

Heightened legislative pressure to reshape category dynamics and pricing strategies

COMPETITIVE LANDSCAPE

Coca-Cola HBC Slovakia maintains leadership but diversifies focus amid category stagnation
Mineralne Vody advances rapidly as bottled water outperforms taxed categories

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