

Carbonates in Slovakia

December 2025

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KEY DATA FINDINGS

2025 DEVELOPMENTS

Carbonates experience severe pressure as taxation, price inflation and weak seasonal demand converge

INDUSTRY PERFORMANCE

Retail volume sales of carbonates decreased in 2025
Reduced sugar cola carbonates performed best, though still declining overall

WHAT'S NEXT?

Retail volume sales of carbonates are expected to rise over the forecast period overall
Digital innovation and reformulation to influence product development and positioning
Legislative tightening to intensify category pressure and shape corporate strategy

COMPETITIVE LANDSCAPE

Coca-Cola HBC Slovakia remains category leader amid intensifying price competition
Private label emerges as the most dynamic competitor in 2025

CHANNELS

Supermarkets remain the leading distribution channel for carbonates
Discounters become the most dynamic channel as consumers trade down

CATEGORY DATA

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EXECUTIVE SUMMARY

Soft drinks struggle under taxation pressure and subdued consumer sentiment

KEY DATA FINDINGS

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

CHANNELS

Supermarkets strengthen their role as consumers prioritise convenience and promotions
Discounters emerge as the strongest offline growth driver while e-commerce accelerates
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