



# Carbonates in Slovakia

December 2025

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## Carbonates in Slovakia - Category analysis

### 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

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## Soft Drinks in Slovakia - Industry Overview

### 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

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