



Concentrates in Slovakia

December 2025

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KEY DATA FINDINGS

2025 DEVELOPMENTS

Sugar tax shock, shifting definitions and functional rivals undermine concentrates

INDUSTRY PERFORMANCE

Concentrates suffer steep decline as taxation and substitution bite

Liquid concentrates perform “least badly”, supported by innovation and promotions

WHAT'S NEXT?

Gradual recovery expected, driven by premium niches and better macro conditions

Digital communities and informal online channels support homemade and niche solutions

Second wave of sugar taxation prolongs headwinds and reinforces downtrading

COMPETITIVE LANDSCAPE

Kofola defends leadership while experimenting with tax-avoiding concepts

Sports nutrition specialists limit declines through functionality and channel focus

CHANNELS

Supermarkets and convenience stores anchor distribution, but their roles diverge by format

Discounters gain ground with sharp pricing and expanding networks

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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

CHANNELS

Supermarkets strengthen their role as consumers prioritise convenience and promotions

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