



# Concentrates in Slovakia

December 2025

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## Concentrates in Slovakia - Category analysis

### 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 struggle under taxation pressure and subdued consumer sentiment

### KEY DATA FINDINGS

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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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