



# Hot Drinks in Slovakia

December 2025

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EXECUTIVE SUMMARY

Persistent cost pressures and shifting consumer priorities shape market behaviour

KEY DATA FINDINGS

INDUSTRY PERFORMANCE

Premium coffee culture persists despite restrained household budgets  
Sugar taxation reshapes pricing, portfolios and demand dynamics

WHAT'S NEXT?

Gradual premiumisation and rising unit prices will define forecast performance  
Health and sustainability trends accelerate portfolio innovation  
Cross-border shopping and legislative uncertainty act as a drag on growth

COMPETITIVE LANDSCAPE

Nestlé Slovensko retains leadership through strong promotions and broad distribution  
Nestlé emerges as one of the most dynamic performers through sustainability commitments and strategic pricing

CHANNELS

Supermarkets sustain their lead through assortment breadth and strong promotions  
Discounters remain the fastest-growing channel as price sensitivity intensifies  
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## SOURCES

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[Coffee in Slovakia](#)

## KEY DATA FINDINGS

### 2025 DEVELOPMENTS

Coffee prices surge as consumers balance restraint with unwavering demand for quality

### INDUSTRY PERFORMANCE

Coffee consumption reflects cautious spending and heightened sensitivity to price promotions

The at-home coffee renaissance continues while foodservice faces efficiency-driven repositioning

Cold coffee formats show rising relevance, especially among younger consumers

Fresh ground coffee pods emerge as the most dynamic format

### WHAT'S NEXT?

Premiumisation, commodity price inflation and maturing consumer tastes shape the forecast outlook

Digitalisation, machine technology and modernised distribution accelerate structural change

Legislative and fiscal pressures will alter category dynamics, benefiting unsweetened coffee formats

### COMPETITIVE LANDSCAPE

Nestlé Slovensko sustains leadership through strong brand equity and promotion-driven resilience

Nestlé also stands out as the most dynamic performer, supported by sustainability credentials and diversified sourcing

### CHANNELS

Supermarkets remain the central hub of coffee retailing due to breadth and affordability

Discounters strengthen their position as the fastest-growing channel

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[Tea in Slovakia](#)

## KEY DATA FINDINGS

### 2025 DEVELOPMENTS

Colder weather, sugar taxation and wellness concerns shift hot drink demand back towards tea

### INDUSTRY PERFORMANCE

Wellness positioning and price sensitivity shape everyday tea consumption patterns

Herbal and traditional medicinal teas lead growth as health and natural remedies gain traction

## WHAT'S NEXT?

Premium functional teas and mature consumption patterns underpin forecast value growth  
Innovation, convenience and sustainability reshape how tea is bought and consumed  
Wellness and sustainability become core expectations rather than niche differentiators

## COMPETITIVE LANDSCAPE

Baliarne Obchodu as Poprad leverages strong local roots and broad positioning to sustain leadership  
Teekanne gains momentum through premium positioning, functional innovation and strong promotion

## CHANNELS

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[Other Hot Drinks in Slovakia](#)

## KEY DATA FINDINGS

### 2025 DEVELOPMENTS

Cocoa price shocks, sugar taxation and cautious consumers reshape category performance

## INDUSTRY PERFORMANCE

Rising cocoa prices drive strong value growth despite pressure on household budgets  
Flavoured powder drinks remain the most dynamic category in current value terms

## WHAT'S NEXT?

Premiumisation and sustained high input prices underpin forecast category growth  
Sustainability, quality expectations and digitalisation shape next-generation product strategies  
Legislative pressures reinforce price growth and intensify consumer downtrading

## COMPETITIVE LANDSCAPE

Nestlé maintains leadership but loses volume share due to price pressures  
Private label ranges outperform as price sensitivity reshapes competitive dynamics

## CHANNELS

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