



Hot Drinks in Slovakia

December 2025

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Hot Drinks in Slovakia

EXECUTIVE SUMMARY

Persistent cost pressures and shifting consumer priorities shape market behaviour

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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

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Supermarkets sustain their lead through assortment breadth and strong promotions

Discounters remain the fastest-growing channel as price sensitivity intensifies

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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

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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

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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

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