



Soft Drinks in North Macedonia

December 2025

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Soft Drinks in North Macedonia

EXECUTIVE SUMMARY

A shift to healthier soft drinks

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INDUSTRY PERFORMANCE

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Health and wellness claims enter the mainstream

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Muted outlook over forecast period

Opportunities to add value

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Flavoured bottled water increasingly popular

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Positive performance in 2025

Still flavoured bottled water gains most volume share

WHAT'S NEXT?

Similar dynamics over forecast period

Functional bottled water also register volume growth, with messaging also focusing on quality

Higher extraction charges leads to price rises

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Minimal retail volume growth in 2025

Tonic water/mixers/other bitters registers highest volume growth

WHAT'S NEXT?

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Increasing focus on making carbonates healthier

COMPETITIVE LANDSCAPE

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Sluggish performance

INDUSTRY PERFORMANCE

Poor performance in 2025

Powder concentrates fare slightly better

WHAT'S NEXT?

Bleak outlook over forecast period
Powder concentrates maintain growth under pressure
Focus on adopting a healthier profile

COMPETITIVE LANDSCAPE

Two local companies have sizeable foothold
Inospektar gains the most volume share

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Small local grocers continue to dominate
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Increasing premiumisation

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Modest volume growth in 2025
100% juice gains most volume share

WHAT'S NEXT?

Continuing moderate growth
Continuing innovation, with local origin also being a key USP
Focus on value-added benefits

COMPETITIVE LANDSCAPE

Vivaks holds on to tight lead
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Small local grocers continue to dominate, though retail e-commerce makes most gains
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INDUSTRY PERFORMANCE

Moderate volume growth, though volume sales low
Several new product launches

WHAT'S NEXT?

Muted volume growth over forecast period
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KEY DATA FINDINGS

2025 DEVELOPMENTS

RTD tea benefits from shift away from carbonates

INDUSTRY PERFORMANCE

Moderate volume growth in 2025

Focus on flavour innovation and packaging

WHAT'S NEXT?

Moderate growth over forecast period

Increasing differentiation and premiumisation

Focus on health benefits, as well as flavour

COMPETITIVE LANDSCAPE

Vivaks holds on to tight lead, though Coca-Cola narrows gap

Kozuvchanka gains most volume share

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[Energy Drinks in North Macedonia](#)

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INDUSTRY PERFORMANCE

Heathy volume growth in 2025

Focus on functional ingredients

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Continuing focus on added benefits

Opportunity to broaden the consumer base

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