



# Soft Drinks in Slovakia

December 2023

Table of Contents

## Soft Drinks in Slovakia

### EXECUTIVE SUMMARY

Soft drinks in 2023: The big picture

2023 key trends

Competitive landscape

Retailing developments

Foodservice vs retail split

What next for soft drinks?

### MARKET DATA

Table 1 - Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: Volume 2018-2023

Table 2 - Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: % Volume Growth 2018-2023

Table 3 - Off-trade vs On-trade Sales of Soft Drinks by Channel: Value 2018-2023

Table 4 - Off-trade vs On-trade Sales of Soft Drinks by Channel: % Value Growth 2018-2023

Table 5 - Off-trade vs On-trade Sales of Soft Drinks (as sold) by Category: Volume 2023

Table 6 - Off-trade vs On-trade Sales of Soft Drinks (as sold) by Category: % Volume 2023

Table 7 - Off-trade vs On-trade Sales of Soft Drinks by Category: Value 2023

Table 8 - Off-trade vs On-trade Sales of Soft Drinks by Category: % Value 2023

Table 9 - Off-trade Sales of Soft Drinks (RTD) by Category: Volume 2018-2023

Table 10 - Off-trade Sales of Soft Drinks (RTD) by Category: % Volume Growth 2018-2023

Table 11 - Off-trade Sales of Soft Drinks by Category: Value 2018-2023

Table 12 - Off-trade Sales of Soft Drinks by Category: % Value Growth 2018-2023

Table 13 - Sales of Soft Drinks by Total Fountain On-trade: Volume 2018-2023

Table 14 - Sales of Soft Drinks by Total Fountain On-trade: % Volume Growth 2018-2023

Table 15 - NBO Company Shares of Off-trade Soft Drinks (RTD): % Volume 2019-2023

Table 16 - LBN Brand Shares of Off-trade Soft Drinks (RTD): % Volume 2020-2023

Table 17 - NBO Company Shares of Off-trade Soft Drinks: % Value 2019-2023

Table 18 - LBN Brand Shares of Off-trade Soft Drinks: % Value 2020-2023

Table 19 - Penetration of Private Label in Off-trade Soft Drinks (RTD) by Category: % Volume 2018-2023

Table 20 - Penetration of Private Label in Off-trade Soft Drinks by Category: % Value 2018-2023

Table 21 - Distribution of Off-trade Soft Drinks (as sold) by Format: % Volume 2018-2023

Table 22 - Distribution of Off-trade Soft Drinks (as sold) by Format and Category: % Volume 2023

Table 23 - Forecast Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: Volume 2023-2028

Table 24 - Forecast Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: % Volume Growth 2023-2028

Table 25 - Forecast Off-trade vs On-trade Sales of Soft Drinks by Channel: Value 2023-2028

Table 26 - Forecast Off-trade vs On-trade Sales of Soft Drinks by Channel: % Value Growth 2023-2028

Table 27 - Forecast Off-trade Sales of Soft Drinks (RTD) by Category: Volume 2023-2028

Table 28 - Forecast Off-trade Sales of Soft Drinks (RTD) by Category: % Volume Growth 2023-2028

Table 29 - Forecast Off-trade Sales of Soft Drinks by Category: Value 2023-2028

Table 30 - Forecast Off-trade Sales of Soft Drinks by Category: % Value Growth 2023-2028

Table 31 - Forecast Sales of Soft Drinks by Total Fountain On-trade: Volume 2023-2028

Table 32 - Forecast Sales of Soft Drinks by Total Fountain On-trade: % Volume Growth 2023-2028

### APPENDIX

Fountain sales in Slovakia

### DISCLAIMER

### SOURCES

Summary 1 - Research Sources

## Bottled Water in Slovakia

## KEY DATA FINDINGS

### 2023 DEVELOPMENTS

Unfavourable weather and low purchasing power increase retail price competition  
Competition in foodservice extends beyond price  
Functional bottled water taps into rising consumer health awareness

### PROSPECTS AND OPPORTUNITIES

New legislation is set to disrupt the packaging of bottled water  
New local trademark shows the way to new growth opportunities  
Still and baby formats to gain attention

### CATEGORY DATA

Table 33 - Off-trade Sales of Bottled Water by Category: Volume 2018-2023  
Table 34 - Off-trade Sales of Bottled Water by Category: Value 2018-2023  
Table 35 - Off-trade Sales of Bottled Water by Category: % Volume Growth 2018-2023  
Table 36 - Off-trade Sales of Bottled Water by Category: % Value Growth 2018-2023  
Table 37 - NBO Company Shares of Off-trade Bottled Water: % Volume 2019-2023  
Table 38 - LBN Brand Shares of Off-trade Bottled Water: % Volume 2020-2023  
Table 39 - NBO Company Shares of Off-trade Bottled Water: % Value 2019-2023  
Table 40 - LBN Brand Shares of Off-trade Bottled Water: % Value 2020-2023  
Table 41 - Forecast Off-trade Sales of Bottled Water by Category: Volume 2023-2028  
Table 42 - Forecast Off-trade Sales of Bottled Water by Category: Value 2023-2028  
Table 43 - Forecast Off-trade Sales of Bottled Water by Category: % Volume Growth 2023-2028  
Table 44 - Forecast Off-trade Sales of Bottled Water by Category: % Value Growth 2023-2028

## Carbonates in Slovakia

## KEY DATA FINDINGS

### 2023 DEVELOPMENTS

Unfavourable weather dampens the demand for carbonates  
Strong competition hampers carbonates' growth potential  
Mango leads flavour trend

### PROSPECTS AND OPPORTUNITIES

Reduced sugar trend linked to growing health awareness  
New legislation to determine carbonates closures  
Flavoured non alcoholic beer to exert strong pressure on carbonates

### CATEGORY DATA

Table 45 - Off-trade vs On-trade Sales of Carbonates: Volume 2018-2023  
Table 46 - Off-trade vs On-trade Sales of Carbonates: Value 2018-2023  
Table 47 - Off-trade vs On-trade Sales of Carbonates: % Volume Growth 2018-2023  
Table 48 - Off-trade vs On-trade Sales of Carbonates: % Value Growth 2018-2023  
Table 49 - Off-trade Sales of Carbonates by Category: Volume 2018-2023  
Table 50 - Off-trade Sales of Carbonates by Category: Value 2018-2023  
Table 51 - Off-trade Sales of Carbonates by Category: % Volume Growth 2018-2023  
Table 52 - Off-trade Sales of Carbonates by Category: % Value Growth 2018-2023  
Table 53 - Total Sales of Carbonates by Fountain On-trade: Volume 2018-2023  
Table 54 - Total Sales of Carbonates by Fountain On-trade: % Volume Growth 2018-2023  
Table 55 - NBO Company Shares of Off-trade Carbonates: % Volume 2019-2023  
Table 56 - LBN Brand Shares of Off-trade Carbonates: % Volume 2020-2023  
Table 57 - NBO Company Shares of Off-trade Carbonates: % Value 2019-2023

Table 58 - LBN Brand Shares of Off-trade Carbonates: % Value 2020-2023

Table 59 - Forecast Off-trade Sales of Carbonates by Category: Volume 2023-2028

Table 60 - Forecast Off-trade Sales of Carbonates by Category: Value 2023-2028

Table 61 - Forecast Off-trade Sales of Carbonates by Category: % Volume Growth 2023-2028

Table 62 - Forecast Off-trade Sales of Carbonates by Category: % Value Growth 2023-2028

Table 63 - Forecast Total Sales of Carbonates by Fountain On-trade: Volume 2023-2028

Table 64 - Forecast Total Sales of Carbonates by Fountain On-trade: % Volume Growth 2023-2028

## Concentrates in Slovakia

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Convenience, marketing and flavour developments sustain an interest in liquid concentrates

Unfavourable weather and an economy focus have significant impacts on concentrates

SodaStream sees strong investment

#### PROSPECTS AND OPPORTUNITIES

Natural and sustainable are key watchwords for concentrates

Fitness and flavour trends offer growth potential for powder concentrates

Premiumisation trend to take off in liquid concentrates

#### CATEGORY DATA

Concentrates Conversions

Summary 2 - Concentrates Conversion Factors for Ready-to-Drink (RTD) Format

Table 65 - Off-trade Sales of Concentrates (RTD) by Category: Volume 2018-2023

Table 66 - Off-trade Sales of Concentrates (RTD) by Category: % Volume Growth 2018-2023

Table 67 - Off-trade Sales of Concentrates by Category: Value 2018-2023

Table 68 - Off-trade Sales of Concentrates by Category: % Value Growth 2018-2023

Table 69 - LBN Brand Shares of Off-trade Concentrates (RTD): % Volume 2020-2023

Table 70 - NBO Company Shares of Off-trade Concentrates: % Value 2019-2023

Table 71 - LBN Brand Shares of Off-trade Concentrates: % Value 2020-2023

Table 72 - NBO Company Shares of Off-trade Liquid Concentrates (RTD): % Volume 2019-2023

Table 73 - LBN Brand Shares of Off-trade Liquid Concentrates (RTD): % Volume 2020-2023

Table 74 - NBO Company Shares of Off-trade Powder Concentrates (RTD): % Volume 2019-2023

Table 75 - LBN Brand Shares of Off-trade Powder Concentrates (RTD): % Volume 2020-2023

Table 76 - Forecast Off-trade Sales of Concentrates (RTD) by Category: Volume 2023-2028

Table 77 - Forecast Off-trade Sales of Concentrates (RTD) by Category: % Volume Growth 2023-2028

Table 78 - Forecast Off-trade Sales of Concentrates by Category: Value 2023-2028

Table 79 - Forecast Off-trade Sales of Concentrates by Category: % Value Growth 2023-2028

## Juice in Slovakia

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Juice continues to face strong competition at the end of the review period

Packaging grows in importance in juice

Price promotions and discounts remain key ways to reach price-sensitive consumers

#### PROSPECTS AND OPPORTUNITIES

Not from concentrate 100% juice to benefit from rising health awareness in the country

Concerns over sugar intake to favour 100% juice and nectars over juice drinks

Strong competition anticipated between private label and branded players

## CATEGORY DATA

Table 80 - Off-trade Sales of Juice by Category: Volume 2018-2023

Table 81 - Off-trade Sales of Juice by Category: Value 2018-2023

Table 82 - Off-trade Sales of Juice by Category: % Volume Growth 2018-2023

Table 83 - Off-trade Sales of Juice by Category: % Value Growth 2018-2023

Table 84 - NBO Company Shares of Off-trade Juice: % Volume 2019-2023

Table 85 - LBN Brand Shares of Off-trade Juice: % Volume 2020-2023

Table 86 - NBO Company Shares of Off-trade Juice: % Value 2019-2023

Table 87 - LBN Brand Shares of Off-trade Juice: % Value 2020-2023

Table 88 - Forecast Off-trade Sales of Juice by Category: Volume 2023-2028

Table 89 - Forecast Off-trade Sales of Juice by Category: Value 2023-2028

Table 90 - Forecast Off-trade Sales of Juice by Category: % Volume Growth 2023-2028

Table 91 - Forecast Off-trade Sales of Juice by Category: % Value Growth 2023-2028

## RTD Coffee in Slovakia

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

On-the-go lifestyles push sales but weak purchasing power limits demand

Few RTD coffee brands able to withstand strong pressure from energy drinks

Private label marches on in RTD coffee

### PROSPECTS AND OPPORTUNITIES

Health and environmental awareness to impact RTD coffee offer and image

Fresh on-the-go coffee threatens to lure consumers away from RTD coffee

Intense competition for consumers between RTD coffee and energy drinks

## CATEGORY DATA

Table 92 - Off-trade Sales of RTD Coffee: Volume 2018-2023

Table 93 - Off-trade Sales of RTD Coffee: Value 2018-2023

Table 94 - Off-trade Sales of RTD Coffee: % Volume Growth 2018-2023

Table 95 - Off-trade Sales of RTD Coffee: % Value Growth 2018-2023

Table 96 - NBO Company Shares of Off-trade RTD Coffee: % Volume 2019-2023

Table 97 - LBN Brand Shares of Off-trade RTD Coffee: % Volume 2020-2023

Table 98 - NBO Company Shares of Off-trade RTD Coffee: % Value 2019-2023

Table 99 - LBN Brand Shares of Off-trade RTD Coffee: % Value 2020-2023

Table 100 - Forecast Off-trade Sales of RTD Coffee: Volume 2023-2028

Table 101 - Forecast Off-trade Sales of RTD Coffee: Value 2023-2028

Table 102 - Forecast Off-trade Sales of RTD Coffee: % Volume Growth 2023-2028

Table 103 - Forecast Off-trade Sales of RTD Coffee: % Value Growth 2023-2028

## RTD Tea in Slovakia

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Climatic, economic and political factors dampen the demand for RTD tea

Foodservice plays a key role in RTD tea's performance and development

Kofola extends Rajec into RTD tea with healthier options

### PROSPECTS AND OPPORTUNITIES

Healthier offer to lead to a healthier performance

Packaging to become a key player in 2024

Strong private label-brand competition

## CATEGORY DATA

- Table 104 - Off-trade Sales of RTD Tea by Category: Volume 2018-2023
- Table 105 - Off-trade Sales of RTD Tea by Category: Value 2018-2023
- Table 106 - Off-trade Sales of RTD Tea by Category: % Volume Growth 2018-2023
- Table 107 - Off-trade Sales of RTD Tea by Category: % Value Growth 2018-2023
- Table 108 - Leading Flavours for Off-trade RTD Tea: % Volume 2018-2023
- Table 109 - NBO Company Shares of Off-trade RTD Tea: % Volume 2019-2023
- Table 110 - LBN Brand Shares of Off-trade RTD Tea: % Volume 2020-2023
- Table 111 - NBO Company Shares of Off-trade RTD Tea: % Value 2019-2023
- Table 112 - LBN Brand Shares of Off-trade RTD Tea: % Value 2020-2023
- Table 113 - Forecast Off-trade Sales of RTD Tea by Category: Volume 2023-2028
- Table 114 - Forecast Off-trade Sales of RTD Tea by Category: Value 2023-2028
- Table 115 - Forecast Off-trade Sales of RTD Tea by Category: % Volume Growth 2023-2028
- Table 116 - Forecast Off-trade Sales of RTD Tea by Category: % Value Growth 2023-2028

## Energy Drinks in Slovakia

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

- Young fun-seeking consumers boost on-trade volume sales of energy drinks
- Mattoni 1873 disrupts the competitive landscape with Guarana
- Private label retailers continue to compete with branded rivals

### PROSPECTS AND OPPORTUNITIES

- Price promotions and discounts to remain important competitive tools in energy drinks players' arsenal
- Competition is set to drive dynamism in energy drinks
- Larger pack sizes to fulfil a variety of needs

## CATEGORY DATA

- Table 117 - Off-trade Sales of Energy Drinks: Volume 2018-2023
- Table 118 - Off-trade Sales of Energy Drinks: Value 2018-2023
- Table 119 - Off-trade Sales of Energy Drinks: % Volume Growth 2018-2023
- Table 120 - Off-trade Sales of Energy Drinks: % Value Growth 2018-2023
- Table 121 - NBO Company Shares of Off-trade Energy Drinks: % Volume 2019-2023
- Table 122 - LBN Brand Shares of Off-trade Energy Drinks: % Volume 2020-2023
- Table 123 - NBO Company Shares of Off-trade Energy Drinks: % Value 2019-2023
- Table 124 - LBN Brand Shares of Off-trade Energy Drinks: % Value 2020-2023
- Table 125 - Forecast Off-trade Sales of Energy Drinks: Volume 2023-2028
- Table 126 - Forecast Off-trade Sales of Energy Drinks: Value 2023-2028
- Table 127 - Forecast Off-trade Sales of Energy Drinks: % Volume Growth 2023-2028
- Table 128 - Forecast Off-trade Sales of Energy Drinks: % Value Growth 2023-2028

## Sports Drinks in Slovakia

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

- Bottled water increases the pressure on sports drinks but also shows the way to development
- Players engage in price promotions to increase the appeal of sports drinks amid unfavourable weather and weak purchasing power
- Growing pressure from convenient, value for money powder concentrates

### PROSPECTS AND OPPORTUNITIES

New packaging cap legislation to impact sports drinks  
Company activity is necessary to improve the image and appeal of sports drinks  
Ageing population and health awareness trends to foster the use of sports drinks

#### CATEGORY DATA

Table 129 - Off-trade Sales of Sports Drinks: Volume 2018-2023  
Table 130 - Off-trade Sales of Sports Drinks: Value 2018-2023  
Table 131 - Off-trade Sales of Sports Drinks: % Volume Growth 2018-2023  
Table 132 - Off-trade Sales of Sports Drinks: % Value Growth 2018-2023  
Table 133 - NBO Company Shares of Off-trade Sports Drinks: % Volume 2019-2023  
Table 134 - LBN Brand Shares of Off-trade Sports Drinks: % Volume 2020-2023  
Table 135 - NBO Company Shares of Off-trade Sports Drinks: % Value 2019-2023  
Table 136 - LBN Brand Shares of Off-trade Sports Drinks: % Value 2020-2023  
Table 137 - Forecast Off-trade Sales of Sports Drinks: Volume 2023-2028  
Table 138 - Forecast Off-trade Sales of Sports Drinks: Value 2023-2028  
Table 139 - Forecast Off-trade Sales of Sports Drinks: % Volume Growth 2023-2028  
Table 140 - Forecast Off-trade Sales of Sports Drinks: % Value Growth 2023-2028

## About Euromonitor International

Euromonitor International is an independent market intelligence provider. Data, insight and analysis stem from in-the-field research spanning 210 national markets.

Content ranges from the in-depth and country-specific, to key strategic themes with a global range and significance. Products cover a comprehensive range of insights and market data, but can be broadly categorised as:

- **Strategy Briefings:** Global or regional in scope, and focussing on the most important themes shaping consumer demand, the key markets, competitive environment and future outlook across a range of industries.
- **Company Profiles:** Analysis dedicated to the world's most significant companies, with detailed insight into their activities, focus of operations, their competitors, their geographic presence and performance.
- **Country Reports:** For an in-depth understanding of specific countries, whether by industry, economic metrics or consumer trends and lifestyles. These reports cover current trends, consumer demand, market potential and future prospects, with country-specific local insight and comprehensive data, unavailable elsewhere.

For more information on this report, further enquiries can be directed via this link [www.euromonitor.com/soft-drinks-in-slovakia/report](http://www.euromonitor.com/soft-drinks-in-slovakia/report).