

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 2022
- Table 6 Off-trade vs On-trade Sales of Soft Drinks (as sold) by Category: % Volume 2022
- Table 7 Off-trade vs On-trade Sales of Soft Drinks by Category: Value 2022
- Table 8 Off-trade vs On-trade Sales of Soft Drinks by Category: % Value 2022
- 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

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.