



Euromonitor
International

RTD Coffee in Slovakia

December 2025

Table of Contents

KEY DATA FINDINGS

2025 DEVELOPMENTS

RTD coffee struggles as sugar tax, soaring input costs and fierce competition bite in 2025

INDUSTRY PERFORMANCE

RTD coffee demand falls as sugar tax and high coffee prices push up unit costs

RTD coffee remains the most dynamic format within its tiny segment, but still lags energy drinks

WHAT'S NEXT?

RTD coffee set to return to growth as mobility, convenience and premiumisation trends strengthen

Foodservice recovery, innovation and digital channels will shape category dynamics

Tougher VAT regime and scrutiny of energy drinks create both headwinds and opportunities

COMPETITIVE LANDSCAPE

Hell Energy SK sro retains leadership by leveraging cross-category strength

Rajo (Meggle Slovakia) drives growth with milk-based café-style innovation

CHANNELS

Supermarkets remain the main gateway to chilled coffee

Discounters gain momentum as private label and sharp pricing win over cautious shoppers

CATEGORY DATA

Table 1 - Off-trade Sales of RTD Coffee: Volume 2020-2025

Table 2 - Off-trade Sales of RTD Coffee: Value 2020-2025

Table 3 - Off-trade Sales of RTD Coffee: % Volume Growth 2020-2025

Table 4 - Off-trade Sales of RTD Coffee: % Value Growth 2020-2025

Table 5 - NBO Company Shares of Off-trade RTD Coffee: % Volume 2021-2025

Table 6 - LBN Brand Shares of Off-trade RTD Coffee: % Volume 2022-2025

Table 7 - NBO Company Shares of Off-trade RTD Coffee: % Value 2021-2025

Table 8 - LBN Brand Shares of Off-trade RTD Coffee: % Value 2022-2025

Table 9 - Forecast Off-trade Sales of RTD Coffee: Volume 2025-2030

Table 10 - Forecast Off-trade Sales of RTD Coffee: Value 2025-2030

Table 11 - Forecast Off-trade Sales of RTD Coffee: % Volume Growth 2025-2030

Table 12 - Forecast Off-trade Sales of RTD Coffee: % Value Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

[Soft Drinks in Slovakia - Industry Overview](#)

EXECUTIVE SUMMARY

Soft drinks struggle under taxation pressure and subdued consumer sentiment

KEY DATA FINDINGS

INDUSTRY PERFORMANCE

Health-driven reformulation gains visibility but is constrained by uniform taxation

Rising competition from non-alcoholic beer limits soft drinks recovery

Energy drinks remain resilient despite economic pressure and rising competition

WHAT'S NEXT?

Soft drinks to face constrained volume recovery amid intensifying cross-category competition

Premiumisation to accelerate as consumers seek healthier and cleaner formulations

Heightened legislative pressure to reshape category dynamics and pricing strategies

COMPETITIVE LANDSCAPE

Coca-Cola HBC Slovakia maintains leadership but diversifies focus amid category stagnation

Mineralne Vody advances rapidly as bottled water outperforms taxed categories

CHANNELS

Supermarkets strengthen their role as consumers prioritise convenience and promotions

Discounters emerge as the strongest offline growth driver while e-commerce accelerates

Foodservice vs retail split

MARKET DATA

Table 13 - Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: Volume 2020-2025

Table 14 - Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: % Volume Growth 2020-2025

Table 15 - Off-trade vs On-trade Sales of Soft Drinks by Channel: Value 2020-2025

Table 16 - Off-trade vs On-trade Sales of Soft Drinks by Channel: % Value Growth 2020-2025

Table 17 - Off-trade vs On-trade Sales of Soft Drinks (as sold) by Category: Volume 2025

Table 18 - Off-trade vs On-trade Sales of Soft Drinks (as sold) by Category: % Volume 2025

Table 19 - Off-trade vs On-trade Sales of Soft Drinks by Category: Value 2025

Table 20 - Off-trade vs On-trade Sales of Soft Drinks by Category: % Value 2025

Table 21 - Off-trade Sales of Soft Drinks (RTD) by Category: Volume 2020-2025

Table 22 - Off-trade Sales of Soft Drinks (RTD) by Category: % Volume Growth 2020-2025

Table 23 - Off-trade Sales of Soft Drinks by Category: Value 2020-2025

Table 24 - Off-trade Sales of Soft Drinks by Category: % Value Growth 2020-2025

Table 25 - Sales of Soft Drinks by Total Fountain On-trade: Volume 2020-2025

Table 26 - Sales of Soft Drinks by Total Fountain On-trade: % Volume Growth 2020-2025

Table 27 - NBO Company Shares of Total Soft Drinks (RTD): % Volume 2021-2025

Table 28 - LBN Brand Shares of Total Soft Drinks (RTD): % Volume 2022-2025

Table 29 - NBO Company Shares of On-trade Soft Drinks (RTD): % Volume 2021-2025

Table 30 - LBN Brand Shares of On-trade Soft Drinks (RTD): % Volume 2022-2025

Table 31 - NBO Company Shares of Off-trade Soft Drinks (RTD): % Volume 2021-2025

Table 32 - LBN Brand Shares of Off-trade Soft Drinks (RTD): % Volume 2022-2025

Table 33 - NBO Company Shares of Off-trade Soft Drinks: % Value 2021-2025

Table 34 - LBN Brand Shares of Off-trade Soft Drinks: % Value 2022-2025

Table 35 - Penetration of Private Label in Off-trade Soft Drinks (RTD) by Category: % Volume 2020-2025

Table 36 - Penetration of Private Label in Off-trade Soft Drinks by Category: % Value 2020-2025

Table 37 - Distribution of Off-trade Soft Drinks (as sold) by Format: % Volume 2020-2025

Table 38 - Distribution of Off-trade Soft Drinks (as sold) by Format and Category: % Volume 2025

Table 39 - Forecast Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: Volume 2025-2030

Table 40 - Forecast Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: % Volume Growth 2025-2030

Table 41 - Forecast Off-trade vs On-trade Sales of Soft Drinks by Channel: Value 2025-2030

Table 42 - Forecast Off-trade vs On-trade Sales of Soft Drinks by Channel: % Value Growth 2025-2030

Table 43 - Forecast Off-trade Sales of Soft Drinks (RTD) by Category: Volume 2025-2030

Table 44 - Forecast Off-trade Sales of Soft Drinks (RTD) by Category: % Volume Growth 2025-2030

Table 45 - Forecast Off-trade Sales of Soft Drinks by Category: Value 2025-2030

Table 46 - Forecast Off-trade Sales of Soft Drinks by Category: % Value Growth 2025-2030

Table 47 - Forecast Sales of Soft Drinks by Total Fountain On-trade: Volume 2025-2030

Table 48 - Forecast Sales of Soft Drinks by Total Fountain On-trade: % Volume Growth 2025-2030

APPENDIX

Fountain sales in Slovakia

COUNTRY REPORTS DISCLAIMER

SOURCES

Summary 1 - Research Sources

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/rtd-coffee-in-slovakia/report.