

# Retail in Slovakia

February 2024

Table of Contents

## EXECUTIVE SUMMARY

Retail in 2023: The big picture

Players continue to form alliances and expand networks, with some new global players also setting up shop in 2023

Retailers continue to innovate

What next for retail?

## OPERATING ENVIRONMENT

Informal retail

Opening hours for physical retail

Summary 1 - Standard Opening Hours by Channel Type 2023

Seasonality

Christmas

Easter

Back to School

## MARKET DATA

Table 1 - Sales in Retail by Retail Offline vs Retail E-Commerce: Value 2018-2023

Table 2 - Sales in Retail by Retail Offline vs Retail E-Commerce: % Value Growth 2018-2023

Table 3 - Sales in Retail Offline by Channel: Value 2018-2023

Table 4 - Sales in Retail Offline by Channel: % Value Growth 2018-2023

Table 5 - Retail Offline Outlets by Channel: Units 2018-2023

Table 6 - Retail Offline Outlets by Channel: % Unit Growth 2018-2023

Table 7 - Sales in Retail E-Commerce by Product: Value 2018-2023

Table 8 - Sales in Retail E-Commerce by Product: % Value Growth 2018-2023

Table 9 - Grocery Retailers: Value Sales, Outlets and Selling Space 2018-2023

Table 10 - Grocery Retailers: Value Sales, Outlets and Selling Space: % Growth 2018-2023

Table 11 - Sales in Grocery Retailers by Channel: Value 2018-2023

Table 12 - Sales in Grocery Retailers by Channel: % Value Growth 2018-2023

Table 13 - Grocery Retailers Outlets by Channel: Units 2018-2023

Table 14 - Grocery Retailers Outlets by Channel: % Unit Growth 2018-2023

Table 15 - Non-Grocery Retailers: Value Sales, Outlets and Selling Space 2018-2023

Table 16 - Non-Grocery Retailers: Value Sales, Outlets and Selling Space: % Growth 2018-2023

Table 17 - Sales in Non-Grocery Retailers by Channel: Value 2018-2023

Table 18 - Sales in Non-Grocery Retailers by Channel: % Value Growth 2018-2023

Table 19 - Non-Grocery Retailers Outlets by Channel: Units 2018-2023

Table 20 - Non-Grocery Retailers Outlets by Channel: % Unit Growth 2018-2023

Table 21 - Retail GBO Company Shares: % Value 2019-2023

Table 22 - Retail GBN Brand Shares: % Value 2020-2023

Table 23 - Retail Offline GBO Company Shares: % Value 2019-2023

Table 24 - Retail Offline GBN Brand Shares: % Value 2020-2023

Table 25 - Retail Offline LBN Brand Shares: Outlets 2020-2023

Table 26 - Retail E-Commerce GBO Company Shares: % Value 2019-2023

Table 27 - Retail E-Commerce GBN Brand Shares: % Value 2020-2023

Table 28 - Grocery Retailers GBO Company Shares: % Value 2019-2023

Table 29 - Grocery Retailers GBN Brand Shares: % Value 2020-2023

Table 30 - Grocery Retailers LBN Brand Shares: Outlets 2020-2023

Table 31 - Non-Grocery Retailers GBO Company Shares: % Value 2019-2023

Table 32 - Non-Grocery Retailers GBN Brand Shares: % Value 2020-2023

Table 33 - Non-Grocery Retailers LBN Brand Shares: Outlets 2020-2023

Table 34 - Forecast Sales in Retail by Retail Offline vs Retail E-Commerce: Value 2023-2028

Table 35 - Forecast Sales in Retail by Retail Offline vs Retail E-Commerce: % Value Growth 2023-2028

Table 36 - Forecast Sales in Retail Offline by Channel: Value 2023-2028

Table 37 - Forecast Sales in Retail Offline by Channel: % Value Growth 2023-2028

Table 38 - Forecast Retail Offline Outlets by Channel: Units 2023-2028

Table 39 - Forecast Retail Offline Outlets by Channel: % Unit Growth 2023-2028

Table 40 - Forecast Sales in Retail E-Commerce by Product: Value 2023-2028

Table 41 - Forecast Sales in Retail E-Commerce by Product: % Value Growth 2023-2028

Table 42 - Grocery Retailers Forecasts: Value Sales, Outlets and Selling Space 2023-2028

Table 43 - Grocery Retailers Forecasts: Value Sales, Outlets and Selling Space: % Growth 2023-2028

Table 44 - Forecast Sales in Grocery Retailers by Channel: Value 2023-2028

Table 45 - Forecast Sales in Grocery Retailers by Channel: % Value Growth 2023-2028

Table 46 - Forecast Grocery Retailers Outlets by Channel: Units 2023-2028

Table 47 - Forecast Grocery Retailers Outlets by Channel: % Unit Growth 2023-2028

Table 48 - Non-Grocery Retailers Forecasts: Value Sales, Outlets and Selling Space 2023-2028

Table 49 - Non-Grocery Retailers Forecasts: Value Sales, Outlets and Selling Space: % Growth 2023-2028

Table 50 - Forecast Sales in Non-Grocery Retailers by Channel: Value 2023-2028

Table 51 - Forecast Sales in Non-Grocery Retailers by Channel: % Value Growth 2023-2028

Table 52 - Forecast Non-Grocery Retailers Outlets by Channel: Units 2023-2028

Table 53 - Forecast Non-Grocery Retailers Outlets by Channel: % Unit Growth 2023-2028

## DISCLAIMER

## SOURCES

Summary 2 - Research Sources

## Convenience Retailers in Slovakia

## KEY DATA FINDINGS

### 2023 DEVELOPMENTS

Fall in current value sales in 2023

Significant number of outlet closures

Môj obchod (Metro) merges with Farmfoods

### PROSPECTS AND OPPORTUNITIES

Interest in 24-hour offering of forecourt retailers

Coop Jednota commits to nationwide e-commerce expansion

Coop Jednota pioneers a 24/7 unmanned store

### CHANNEL DATA

Table 54 - Convenience Retailers: Value Sales, Outlets and Selling Space 2018-2023

Table 55 - Convenience Retailers: Value Sales, Outlets and Selling Space: % Growth 2018-2023

Table 56 - Sales in Convenience Retailers by Channel: Value 2018-2023

Table 57 - Sales in Convenience Retailers by Channel: % Value Growth 2018-2023

Table 58 - Convenience Retailers GBO Company Shares: % Value 2019-2023

Table 59 - Convenience Retailers GBN Brand Shares: % Value 2020-2023

Table 60 - Convenience Retailers LBN Brand Shares: Outlets 2020-2023

Table 61 - Convenience Retailers Forecasts: Value Sales, Outlets and Selling Space 2023-2028

Table 62 - Convenience Retailers Forecasts: Value Sales, Outlets and Selling Space: % Growth 2023-2028

Table 63 - Forecast Sales in Convenience Retailers by Channel: Value 2023-2028

Table 64 - Forecast Sales in Convenience Retailers by Channel: % Value Growth 2023-2028

## Supermarkets in Slovakia

## KEY DATA FINDINGS

## 2023 DEVELOPMENTS

Fall in current value sales in 2023

Supermarket retailers continues expansion into forecourts

Continued upgrading of Coop Jednota Tempo brand

## PROSPECTS AND OPPORTUNITIES

New player Biedronka could shake up competitive landscape

Tesco personalises its offerings

Innovative use of technology key differentiator

## CHANNEL DATA

Table 65 - Supermarkets: Value Sales, Outlets and Selling Space 2018-2023

Table 66 - Supermarkets: Value Sales, Outlets and Selling Space: % Growth 2018-2023

Table 67 - Supermarkets GBO Company Shares: % Value 2019-2023

Table 68 - Supermarkets GBN Brand Shares: % Value 2020-2023

Table 69 - Supermarkets LBN Brand Shares: Outlets 2020-2023

Table 70 - Supermarkets Forecasts: Value Sales, Outlets and Selling Space 2023-2028

Table 71 - Supermarkets Forecasts: Value Sales, Outlets and Selling Space: % Growth 2023-2028

## Hypermarkets in Slovakia

## KEY DATA FINDINGS

### 2023 DEVELOPMENTS

Further outlet openings boost current value sales

Kaufland use Slovakia as test ground for eco-friendly store

Kaufland introduces Scan&Shop

### PROSPECTS AND OPPORTUNITIES

Kaufland launches online marketplace

Tesco personalises its offerings

Increased competition over forecast period

### CHANNEL DATA

Table 72 - Hypermarkets: Value Sales, Outlets and Selling Space 2018-2023

Table 73 - Hypermarkets: Value Sales, Outlets and Selling Space: % Growth 2018-2023

Table 74 - Hypermarkets GBO Company Shares: % Value 2019-2023

Table 75 - Hypermarkets GBN Brand Shares: % Value 2020-2023

Table 76 - Hypermarkets LBN Brand Shares: Outlets 2020-2023

Table 77 - Hypermarkets Forecasts: Value Sales, Outlets and Selling Space 2023-2028

Table 78 - Hypermarkets Forecasts: Value Sales, Outlets and Selling Space: % Growth 2023-2028

## Discounters in Slovakia

## KEY DATA FINDINGS

### 2023 DEVELOPMENTS

Current value growth in 2023

Lidl continues to dominate

Lidl continues to expand

### PROSPECTS AND OPPORTUNITIES

Lidl not entering grocery e-commerce

New player Biedronka could shake up competitive landscape

Arrival of Russian discount chain Mere delayed

## CHANNEL DATA

Table 79 - Discounters: Value Sales, Outlets and Selling Space 2018-2023

Table 80 - Discounters: Value Sales, Outlets and Selling Space: % Growth 2018-2023

Table 81 - Discounters GBO Company Shares: % Value 2019-2023

Table 82 - Discounters GBN Brand Shares: % Value 2020-2023

Table 83 - Discounters LBN Brand Shares: Outlets 2020-2023

Table 84 - Discounters Forecasts: Value Sales, Outlets and Selling Space 2023-2028

Table 85 - Discounters Forecasts: Value Sales, Outlets and Selling Space: % Growth 2023-2028

## Small Local Grocers in Slovakia

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Fall in current value sales in 2023

Mixed performance for specialist retailers

Increasing competition from convenience retailers

### PROSPECTS AND OPPORTUNITIES

Further fall in constant value sales over forecast period

Sustainability key focus over forecast period

Consolidation likely over forecast period

## CHANNEL DATA

Table 86 - Small Local Grocers: Value Sales, Outlets and Selling Space 2018-2023

Table 87 - Small Local Grocers: Value Sales, Outlets and Selling Space: % Growth 2018-2023

Table 88 - Small Local Grocers GBO Company Shares: % Value 2019-2023

Table 89 - Small Local Grocers GBN Brand Shares: % Value 2020-2023

Table 90 - Small Local Grocers LBN Brand Shares: Outlets 2020-2023

Table 91 - Small Local Grocers Forecasts: Value Sales, Outlets and Selling Space 2023-2028

Table 92 - Small Local Grocers Forecasts: Value Sales, Outlets and Selling Space: % Growth 2023-2028

## Apparel and Footwear Specialists in Slovakia

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Consumers cut back on non-essentials

Consolidation as player look to save costs

Consumers adopt thriftier behaviour

### PROSPECTS AND OPPORTUNITIES

Positive outlook over forecast period

Fast fashion registers high growth

Further development in e-commerce

## CHANNEL DATA

Table 93 - Apparel and Footwear Specialists: Value Sales, Outlets and Selling Space 2018-2023

Table 94 - Apparel and Footwear Specialists: Value Sales, Outlets and Selling Space: % Growth 2018-2023

Table 95 - Apparel and Footwear Specialists GBO Company Shares: % Value 2019-2023

Table 96 - Apparel and Footwear Specialists GBN Brand Shares: % Value 2020-2023

Table 97 - Apparel and Footwear Specialists LBN Brand Shares: Outlets 2020-2023

Table 98 - Apparel and Footwear Specialists Forecasts: Value Sales, Outlets and Selling Space 2023-2028

## Table 99 - Apparel and Footwear Specialists Forecasts: Value Sales, Outlets and Selling Space: % Growth 2023-2028

### Appliances and Electronics Specialists in Slovakia

#### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Significant fall in value sales in 2023  
Intense price competition triggers price war  
Increased sales of second-hand items

#### PROSPECTS AND OPPORTUNITIES

New Building Act should boost home construction and boost volume sales for larger appliances  
Customer service key competitive tool  
Brick-and-mortar sees changing role

#### CHANNEL DATA

Table 100 - Appliances and Electronics Specialists: Value Sales, Outlets and Selling Space 2018-2023  
Table 101 - Appliances and Electronics Specialists: Value Sales, Outlets and Selling Space: % Growth 2018-2023  
Table 102 - Appliances and Electronics Specialists GBO Company Shares: % Value 2019-2023  
Table 103 - Appliances and Electronics Specialists GBN Brand Shares: % Value 2020-2023  
Table 104 - Appliances and Electronics Specialists LBN Brand Shares: Outlets 2020-2023  
Table 105 - Appliances and Electronics Specialists Forecasts: Value Sales, Outlets and Selling Space 2023-2028  
Table 106 - Appliances and Electronics Specialists Forecasts: Value Sales, Outlets and Selling Space: % Growth 2023-2028

### Home Products Specialists in Slovakia

#### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Worst performing retail channel in 2023  
Top Shop casualty from rising costs  
Pets shops and superstores outlier and registers value growth

#### PROSPECTS AND OPPORTUNITIES

New Building Act should boost home construction and boost value sales for homewares and home furnishings  
E-commerce important battleground over forecast period  
Boosting consumer loyalty key over forecast period

#### CHANNEL DATA

Table 107 - Home Products Specialists: Value Sales, Outlets and Selling Space 2018-2023  
Table 108 - Home Products Specialists: Value Sales, Outlets and Selling Space: % Growth 2018-2023  
Table 109 - Sales in Home Products Specialists by Channel: Value 2018-2023  
Table 110 - Sales in Home Products Specialists by Channel: % Value Growth 2018-2023  
Table 111 - Home Products Specialists GBO Company Shares: % Value 2019-2023  
Table 112 - Home Products Specialists GBN Brand Shares: % Value 2020-2023  
Table 113 - Home Products Specialists LBN Brand Shares: Outlets 2020-2023  
Table 114 - Home Products Specialists Forecasts: Value Sales, Outlets and Selling Space 2023-2028  
Table 115 - Home Products Specialists Forecasts: Value Sales, Outlets and Selling Space: % Growth 2023-2028  
Table 116 - Forecast Sales in Home Products Specialists by Channel: Value 2023-2028  
Table 117 - Forecast Sales in Home Products Specialists by Channel: % Value Growth 2023-2028

### Health and Beauty Specialists in Slovakia

#### KEY DATA FINDINGS

## 2023 DEVELOPMENTS

Health and beauty specialists best performing retail channel in 2023

Players compete through discounts

Pharmacy chains lead

## PROSPECTS AND OPPORTUNITIES

Increased focus on sustainability and natural ingredients

Arrival of global players could shake up competitive landscape

Players focus on omnichannel strategy

## CHANNEL DATA

Table 118 - Health and Beauty Specialists: Value Sales, Outlets and Selling Space 2018-2023

Table 119 - Health and Beauty Specialists: Value Sales, Outlets and Selling Space: % Growth 2018-2023

Table 120 - Sales in Health and Beauty Specialists by Channel: Value 2018-2023

Table 121 - Sales in Health and Beauty Specialists by Channel: % Value Growth 2018-2023

Table 122 - Health and Beauty Specialists GBO Company Shares: % Value 2019-2023

Table 123 - Health and Beauty Specialists GBN Brand Shares: % Value 2020-2023

Table 124 - Health and Beauty Specialists LBN Brand Shares: Outlets 2020-2023

Table 125 - Health and Beauty Specialists Forecasts: Value Sales, Outlets and Selling Space 2023-2028

Table 126 - Health and Beauty Specialists Forecasts: Value Sales, Outlets and Selling Space: % Growth 2023-2028

Table 127 - Forecast Sales in Health and Beauty Specialists by Channel: Value 2023-2028

Table 128 - Forecast Sales in Health and Beauty Specialists by Channel: % Value Growth 2023-2028

## Vending in Slovakia

## KEY DATA FINDINGS

### 2023 DEVELOPMENTS

Increase in current value sales in 2023

Increased costs of installation in 2023

Demand for premium coffee sees vending lose out to takeaway options

### PROSPECTS AND OPPORTUNITIES

Moderate outlook over forecast period

Vending represents significant cost saving for retailers

Non-traditional products see growth over forecast period

### CHANNEL DATA

Table 129 - Vending by Product: Value 2018-2023

Table 130 - Vending by Product: % Value Growth 2018-2023

Table 131 - Vending GBO Company Shares: % Value 2019-2023

Table 132 - Vending GBN Brand Shares: % Value 2020-2023

Table 133 - Vending Forecasts by Product: Value 2023-2028

Table 134 - Vending Forecasts by Product: % Value Growth 2023-2028

## Direct Selling in Slovakia

## KEY DATA FINDINGS

### 2023 DEVELOPMENTS

Continued fall in value sales in 2023

Avon and Oriflame hold on to healthy lead

Large international companies dominate the channel

### PROSPECTS AND OPPORTUNITIES

Worst performing retail channel over forecast period  
Direct sellers adjust to the online space  
Increased demand for premium products over forecast period

#### CHANNEL DATA

Table 135 - Direct Selling by Product: Value 2018-2023  
Table 136 - Direct Selling by Product: % Value Growth 2018-2023  
Table 137 - Direct Selling GBO Company Shares: % Value 2019-2023  
Table 138 - Direct Selling GBN Brand Shares: % Value 2020-2023  
Table 139 - Direct Selling Forecasts by Product: Value 2023-2028  
Table 140 - Direct Selling Forecasts by Product: % Value Growth 2023-2028

#### Retail E-Commerce in Slovakia

#### KEY DATA FINDINGS

##### 2023 DEVELOPMENTS

Modest current value increase in 2023  
Competition getting fiercer  
Same-day delivery increasingly popular

##### PROSPECTS AND OPPORTUNITIES

Intensifying competition over forecast period  
Pikito offers brick-and-mortar space for e-commerce retailers  
Efficient delivery key differentiator in online space

#### CHANNEL DATA

Table 141 - Retail E-Commerce by Channel: Value 2017-2022  
Table 142 - Retail E-Commerce by Channel: % Value Growth 2017-2022  
Table 143 - Retail E-Commerce by Product: Value 2017-2022  
Table 144 - Retail E-Commerce by Product: % Value Growth 2017-2022  
Table 145 - Retail E-Commerce GBO Company Shares: % Value 2018-2022  
Table 146 - Retail E-Commerce GBN Brand Shares: % Value 2019-2022  
Table 147 - Forecast Retail E-Commerce by Channel: Value 2022-2027  
Table 148 - Forecast Retail E-Commerce by Channel: % Value Growth 2022-2027  
Table 149 - Forecast Retail E-Commerce by Product: Value 2022-2027  
Table 150 - Forecast Retail E-Commerce by Product: % Value Growth 2022-2027

## 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/retail-in-slovakia/report](http://www.euromonitor.com/retail-in-slovakia/report).