



# Coffee in Slovakia

December 2025

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## KEY DATA FINDINGS

### 2025 DEVELOPMENTS

Coffee prices surge as consumers balance restraint with unwavering demand for quality

### INDUSTRY PERFORMANCE

Coffee consumption reflects cautious spending and heightened sensitivity to price promotions

The at-home coffee renaissance continues while foodservice faces efficiency-driven repositioning

Cold coffee formats show rising relevance, especially among younger consumers

Fresh ground coffee pods emerge as the most dynamic format

### WHAT'S NEXT?

Premiumisation, commodity price inflation and maturing consumer tastes shape the forecast outlook

Digitalisation, machine technology and modernised distribution accelerate structural change

Legislative and fiscal pressures will alter category dynamics, benefiting unsweetened coffee formats

### COMPETITIVE LANDSCAPE

Nestlé Slovensko sustains leadership through strong brand equity and promotion-driven resilience

Nestlé also stands out as the most dynamic performer, supported by sustainability credentials and diversified sourcing

### CHANNELS

Supermarkets remain the central hub of coffee retailing due to breadth and affordability

Discounters strengthen their position as the fastest-growing channel

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## Hot Drinks in Slovakia - Industry Overview

### EXECUTIVE SUMMARY

Persistent cost pressures and shifting consumer priorities shape market behaviour

### KEY DATA FINDINGS

### INDUSTRY PERFORMANCE

Premium coffee culture persists despite restrained household budgets

Sugar taxation reshapes pricing, portfolios and demand dynamics

### WHAT'S NEXT?

Gradual premiumisation and rising unit prices will define forecast performance

Health and sustainability trends accelerate portfolio innovation

Cross-border shopping and legislative uncertainty act as a drag on growth

## COMPETITIVE LANDSCAPE

Nestlé Slovensko retains leadership through strong promotions and broad distribution

Nestlé emerges as one of the most dynamic performers through sustainability commitments and strategic pricing

## CHANNELS

Supermarkets sustain their lead through assortment breadth and strong promotions

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