

Carbonates in Slovenia

January 2026

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KEY DATA FINDINGS

2025 DEVELOPMENTS

Health trends reshape consumption

INDUSTRY PERFORMANCE

Modest growth for carbonates as consumers shift to perceive healthier soft drinks
Reduced-sugar other non-cola carbonates sees fastest growth

WHAT'S NEXT?

Minimal growth expected as consumers shift towards healthier beverages
Carbonates to embrace health-focused innovation and product diversification
Regulatory changes to impact manufacturer strategies

COMPETITIVE LANDSCAPE

Coca-Cola HBC Slovenija doo leads sales with broad brand portfolio
Jamnica doo drives growth through innovation

CHANNELS

Hypermarkets offer one-stop shopping convenience
Retail e-commerce leads growth

CATEGORY DATA

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EXECUTIVE SUMMARY

Soft drinks landscape becomes increasingly polarised

KEY DATA FINDINGS

INDUSTRY PERFORMANCE

Modest growth for soft drinks

Manufacturers navigate a polarised landscape

Health and wellness claims move into the mainstream

WHAT'S NEXT?

Continued growth, despite demographic constraints

New entrants expected as private label strengthens

E-commerce to drive growth while modern grocery retailers will remain dominant

COMPETITIVE LANDSCAPE

Radenska retains its leadership

Nestlé Adriatic emerges as most dynamic soft drinks company

CHANNELS

Supermarkets and hypermarkets dominate soft drinks distribution

Retail e-commerce leads growth

Foodservice vs retail split

MARKET DATA

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