



Euromonitor
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Soft Drinks in North Macedonia

December 2025

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EXECUTIVE SUMMARY

A shift to healthier soft drinks

KEY DATA FINDINGS

INDUSTRY PERFORMANCE

Muted picture in 2025

Continuing price sensitivity

Health and wellness claims enter the mainstream

WHAT'S NEXT?

Muted outlook over forecast period

Opportunities to add value

Both winners and losers

COMPETITIVE LANDSCAPE

Fruvita gains most volume share

CHANNELS

Small local grocers continue to dominate distribution

Retail e-commerce gains most value share

Foodservice vs retail split

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Flavoured bottled water increasingly popular

INDUSTRY PERFORMANCE

Positive performance in 2025

Still flavoured bottled water gains most volume share

WHAT'S NEXT?

Similar dynamics over forecast period

Functional bottled water also register volume growth, with messaging also focusing on quality

Higher extraction charges leads to price rises

COMPETITIVE LANDSCAPE

Kozuvchanka continues to have commanding lead

Large influx of new companies

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[Carbonates in North Macedonia](#)

KEY DATA FINDINGS

2025 DEVELOPMENTS

Focus on healthier options

INDUSTRY PERFORMANCE

Minimal retail volume growth in 2025

Tonic water/mixers/other bitters registers highest volume growth

WHAT'S NEXT?

Bleak outlook over forecast period

Players continue to innovate

Increasing focus on making carbonates healthier

COMPETITIVE LANDSCAPE

Coca-Cola's Pivara holds on to commanding lead

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CHANNELS

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[Concentrates in North Macedonia](#)

KEY DATA FINDINGS

2025 DEVELOPMENTS

Sluggish performance

INDUSTRY PERFORMANCE

Poor performance in 2025

Powder concentrates fare slightly better

WHAT'S NEXT?

Bleak outlook over forecast period
Powder concentrates maintain growth under pressure
Focus on adopting a healthier profile

COMEPETITIVE LANDSCAPE

Two local companies have sizeable foothold
Inospektar gains the most volume share

CHANNELS

Small local grocers continue to dominate
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[Juice in North Macedonia](#)

KEY DATA FINDINGS

2025 DEVELOPMENTS

Increasing premiumisation

INDUSTRY PERFORMANCE

Modest volume growth in 2025
100% juice gains most volume share

WHAT'S NEXT?

Continuing moderate growth
Continuing innovation, with local origin also being a key USP
Focus on value-added benefits

COMPETITIVE LANDSCAPE

Vivaks holds on to tight lead
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CHANNELS

Small local grocers continue to dominate, though retail e-commerce makes most gains
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[RTD Coffee in North Macedonia](#)

KEY DATA FINDINGS

2025 DEVELOPMENTS

High prices continue to dampen volume sales

INDUSTRY PERFORMANCE

Moderate volume growth, though volume sales low

Several new product launches

WHAT'S NEXT?

Muted volume growth over forecast period

Continuing product development

Wellness and sustainability key focus areas

COMPETITIVE LANDSCAPE

Two top players dominate

Increasing competition

CHANNELS

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RTD Tea in North Macedonia

KEY DATA FINDINGS

2025 DEVELOPMENTS

RTD tea benefits from shift away from carbonates

INDUSTRY PERFORMANCE

Moderate volume growth in 2025

Focus on flavour innovation and packaging

WHAT'S NEXT?

Moderate growth over forecast period

Increasing differentiation and premiumisation

Focus on health benefits, as well as flavour

COMPETITIVE LANDSCAPE

Vivaks holds on to tight lead, though Coca-Cola narrows gap

Kozuvchanka gains most volume share

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Red Bull still dominates, but competition increasing

INDUSTRY PERFORMANCE

Healthy volume growth in 2025

Reduced sugar energy drinks gain most volume share, while functional sparkling offerings also growing in popularity

WHAT'S NEXT?

Healthy outlook over forecast period
Continuing innovation and differentiation
Possible tighter regulations

COMPETITIVE LANDSCAPE

Red Bull still dominates
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[Sports Drinks in North Macedonia](#)

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2025 DEVELOPMENTS

Sports drinks still an emerging product

INDUSTRY PERFORMANCE

Heathy volume growth in 2025
Focus on functional ingredients

WHAT'S NEXT?

Rosy outlook over forecast period
Continuing focus on added benefits
Opportunity to broaden the consumer base

COMPETITIVE LANDSCAPE

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