

Soft Drinks in Slovenia

January 2024

Table of Contents

Soft Drinks in Slovenia

EXECUTIVE SUMMARY

Soft drinks in 2023: The big picture

2023 key trends

Competitive landscape

Retailing developments

Foodservice vs retail split

What next for soft drinks?

MARKET DATA

Table 1 - Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: Volume 2018-2023

Table 2 - Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: % Volume Growth 2018-2023

Table 3 - Off-trade vs On-trade Sales of Soft Drinks by Channel: Value 2018-2023

Table 4 - Off-trade vs On-trade Sales of Soft Drinks by Channel: % Value Growth 2018-2023

Table 5 - Off-trade vs On-trade Sales of Soft Drinks (as sold) by Category: Volume 2022

Table 6 - Off-trade vs On-trade Sales of Soft Drinks (as sold) by Category: % Volume 2022

Table 7 - Off-trade vs On-trade Sales of Soft Drinks by Category: Value 2022

Table 8 - Off-trade vs On-trade Sales of Soft Drinks by Category: % Value 2022

Table 9 - Off-trade Sales of Soft Drinks (RTD) by Category: Volume 2018-2023

Table 10 - Off-trade Sales of Soft Drinks (RTD) by Category: % Volume Growth 2018-2023

Table 11 - Off-trade Sales of Soft Drinks by Category: Value 2018-2023

Table 12 - Off-trade Sales of Soft Drinks by Category: % Value Growth 2018-2023

Table 13 - Sales of Soft Drinks by Total Fountain On-trade: Volume 2018-2023

Table 14 - Sales of Soft Drinks by Total Fountain On-trade: % Volume Growth 2018-2023

Table 15 - NBO Company Shares of Off-trade Soft Drinks (RTD): % Volume 2019-2023

Table 16 - LBN Brand Shares of Off-trade Soft Drinks (RTD): % Volume 2020-2023

Table 17 - NBO Company Shares of Off-trade Soft Drinks: % Value 2019-2023

Table 18 - LBN Brand Shares of Off-trade Soft Drinks: % Value 2020-2023

Table 19 - Penetration of Private Label in Off-trade Soft Drinks (RTD) by Category: % Volume 2018-2023

Table 20 - Penetration of Private Label in Off-trade Soft Drinks by Category: % Value 2018-2023

Table 21 - Distribution of Off-trade Soft Drinks (as sold) by Format: % Volume 2018-2023

Table 22 - Distribution of Off-trade Soft Drinks (as sold) by Format and Category: % Volume 2023

Table 23 - Forecast Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: Volume 2023-2028

Table 24 - Forecast Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: % Volume Growth 2023-2028

Table 25 - Forecast Off-trade vs On-trade Sales of Soft Drinks by Channel: Value 2023-2028

Table 26 - Forecast Off-trade vs On-trade Sales of Soft Drinks by Channel: % Value Growth 2023-2028

Table 27 - Forecast Off-trade Sales of Soft Drinks (RTD) by Category: Volume 2023-2028

Table 28 - Forecast Off-trade Sales of Soft Drinks (RTD) by Category: % Volume Growth 2023-2028

Table 29 - Forecast Off-trade Sales of Soft Drinks by Category: Value 2023-2028

Table 30 - Forecast Off-trade Sales of Soft Drinks by Category: % Value Growth 2023-2028

Table 31 - Forecast Sales of Soft Drinks by Total Fountain On-trade: Volume 2023-2028

Table 32 - Forecast Sales of Soft Drinks by Total Fountain On-trade: % Volume Growth 2023-2028

DISCLAIMER

SOURCES

Summary 1 - Research Sources

Bottled Water in Slovenia

KEY DATA FINDINGS

2023 DEVELOPMENTS

Bottled water witnesses steady volume growth
Functional bottled water enjoys moderate growth
Radenska asserts its leads in bottled water

PROSPECTS AND OPPORTUNITIES

Bottled water faces promising outlook
On-trade channel to witness robust growth
Digital campaigns to gain traction in bottled water

CATEGORY DATA

Table 33 - Off-trade Sales of Bottled Water by Category: Volume 2018-2023
Table 34 - Off-trade Sales of Bottled Water by Category: Value 2018-2023
Table 35 - Off-trade Sales of Bottled Water by Category: % Volume Growth 2018-2023
Table 36 - Off-trade Sales of Bottled Water by Category: % Value Growth 2018-2023
Table 37 - NBO Company Shares of Off-trade Bottled Water: % Volume 2019-2023
Table 38 - LBN Brand Shares of Off-trade Bottled Water: % Volume 2020-2023
Table 39 - NBO Company Shares of Off-trade Bottled Water: % Value 2019-2023
Table 40 - LBN Brand Shares of Off-trade Bottled Water: % Value 2020-2023
Table 41 - Forecast Off-trade Sales of Bottled Water by Category: Volume 2023-2028
Table 42 - Forecast Off-trade Sales of Bottled Water by Category: Value 2023-2028
Table 43 - Forecast Off-trade Sales of Bottled Water by Category: % Volume Growth 2023-2028
Table 44 - Forecast Off-trade Sales of Bottled Water by Category: % Value Growth 2023-2028

Carbonates in Slovenia

KEY DATA FINDINGS

2023 DEVELOPMENTS

Reduced sugar carbonates continue to gain popularity
Players focus on harnessing sustainability
Premium carbonates perform well as mixers for alcoholic drinks

PROSPECTS AND OPPORTUNITIES

Carbonates under pressure from rising health concerns
Digital platforms will be key focus of marketing strategies
Local craft drinks to emerge in mixers

CATEGORY DATA

Table 45 - Off-trade vs On-trade Sales of Carbonates: Volume 2018-2023
Table 46 - Off-trade vs On-trade Sales of Carbonates: Value 2018-2023
Table 47 - Off-trade vs On-trade Sales of Carbonates: % Volume Growth 2018-2023
Table 48 - Off-trade vs On-trade Sales of Carbonates: % Value Growth 2018-2023
Table 49 - Off-trade Sales of Carbonates by Category: Volume 2018-2023
Table 50 - Off-trade Sales of Carbonates by Category: Value 2018-2023
Table 51 - Off-trade Sales of Carbonates by Category: % Volume Growth 2018-2023
Table 52 - Off-trade Sales of Carbonates by Category: % Value Growth 2018-2023
Table 53 - Sales of Carbonates by Total Fountain On-trade: Volume 2018-2023
Table 54 - Sales of Carbonates by Total Fountain On-trade: % Volume Growth 2018-2023
Table 55 - NBO Company Shares of Off-trade Carbonates: % Volume 2019-2023
Table 56 - LBN Brand Shares of Off-trade Carbonates: % Volume 2020-2023
Table 57 - NBO Company Shares of Off-trade Carbonates: % Value 2019-2023
Table 58 - LBN Brand Shares of Off-trade Carbonates: % Value 2020-2023
Table 59 - Forecast Off-trade Sales of Carbonates by Category: Volume 2023-2028
Table 60 - Forecast Off-trade Sales of Carbonates by Category: Value 2023-2028

Table 61 - Forecast Off-trade Sales of Carbonates by Category: % Volume Growth 2023-2028

Table 62 - Forecast Off-trade Sales of Carbonates by Category: % Value Growth 2023-2028

Table 63 - Forecast Sales of Carbonates by Total Fountain On-trade: Volume 2023-2028

Table 64 - Forecast Sales of Carbonates by Total Fountain On-trade: % Volume Growth 2023-2028

Concentrates in Slovenia

KEY DATA FINDINGS

2023 DEVELOPMENTS

Concentrates enjoy steady volume performance amid inflationary pressures

Cedevita dominates in powder concentrates

Oraketa gains traction in powder concentrates

PROSPECTS AND OPPORTUNITIES

Moderate growth expected in concentrates category

Health awareness to drive functional trend in concentrates

New local brands expected to emerge

CATEGORY DATA

Concentrates Conversions

Summary 2 - Concentrates Conversion Factors for Ready-to-Drink (RTD) Format

Table 65 - Off-trade Sales of Concentrates (RTD) by Category: Volume 2018-2023

Table 66 - Off-trade Sales of Concentrates by Category: Value 2018-2023

Table 67 - Off-trade Sales of Concentrates (RTD) by Category: % Volume Growth 2018-2023

Table 68 - Off-trade Sales of Concentrates by Category: % Value Growth 2018-2023

Table 69 - NBO Company Shares of Off-trade Concentrates (RTD): % Volume 2019-2023

Table 70 - LBN Brand Shares of Off-trade Concentrates (RTD): % Volume 2020-2023

Table 71 - NBO Company Shares of Off-trade Concentrates: % Value 2019-2023

Table 72 - LBN Brand Shares of Off-trade Concentrates: % Value 2020-2023

Table 73 - NBO Company Shares of Off-trade Liquid Concentrates (RTD): % Volume 2019-2023

Table 74 - LBN Brand Shares of Off-trade Liquid Concentrates (RTD): % Volume 2020-2023

Table 75 - NBO Company Shares of Off-trade Powder Concentrates (RTD): % Volume 2019-2023

Table 76 - LBN Brand Shares of Off-trade Powder Concentrates (RTD): % Volume 2020-2023

Table 77 - Forecast Off-trade Sales of Concentrates (RTD) by Category: Volume 2023-2028

Table 78 - Forecast Off-trade Sales of Concentrates by Category: Value 2023-2028

Table 79 - Forecast Off-trade Sales of Concentrates (RTD) by Category: % Volume Growth 2023-2028

Table 80 - Forecast Off-trade Sales of Concentrates by Category: % Value Growth 2023-2028

Juice in Slovenia

KEY DATA FINDINGS

2023 DEVELOPMENTS

100% juice draws in health conscious consumers

Inflationary pressures drive shift to more affordable juices

Functional health properties are of key consumer interest

PROSPECTS AND OPPORTUNITIES

Steady growth outlook for juice

Sustainability trend to deliver greener packaging

Local producers to capture demand for Slovenian juice products

CATEGORY DATA

Table 81 - Off-trade Sales of Juice by Category: Volume 2018-2023

Table 82 - Off-trade Sales of Juice by Category: Value 2018-2023

Table 83 - Off-trade Sales of Juice by Category: % Volume Growth 2018-2023

Table 84 - Off-trade Sales of Juice by Category: % Value Growth 2018-2023

Table 85 - NBO Company Shares of Off-trade Juice: % Volume 2019-2023

Table 86 - LBN Brand Shares of Off-trade Juice: % Volume 2020-2023

Table 87 - NBO Company Shares of Off-trade Juice: % Value 2019-2023

Table 88 - LBN Brand Shares of Off-trade Juice: % Value 2020-2023

Table 89 - Forecast Off-trade Sales of Juice by Category: Volume 2023-2028

Table 90 - Forecast Off-trade Sales of Juice by Category: Value 2023-2028

Table 91 - Forecast Off-trade Sales of Juice by Category: % Volume Growth 2023-2028

Table 92 - Forecast Off-trade Sales of Juice by Category: % Value Growth 2023-2028

RTD Coffee in Slovenia

KEY DATA FINDINGS

2023 DEVELOPMENTS

RTD coffee enjoys steady growth

Cafemio maintains its lead in RTD coffee

Premium coffee caters to more sophisticated tastes

PROSPECTS AND OPPORTUNITIES

RTD coffee to witness steady growth momentum

Innovative flavours to capture consumer's attention

Sustainable packaging solutions in demand

CATEGORY DATA

Table 93 - Off-trade Sales of RTD Coffee: Volume 2018-2023

Table 94 - Off-trade Sales of RTD Coffee: Value 2018-2023

Table 95 - Off-trade Sales of RTD Coffee: % Volume Growth 2018-2023

Table 96 - Off-trade Sales of RTD Coffee: % Value Growth 2018-2023

Table 97 - NBO Company Shares of Off-trade RTD Coffee: % Volume 2019-2023

Table 98 - LBN Brand Shares of Off-trade RTD Coffee: % Volume 2020-2023

Table 99 - NBO Company Shares of Off-trade RTD Coffee: % Value 2019-2023

Table 100 - LBN Brand Shares of Off-trade RTD Coffee: % Value 2020-2023

Table 101 - Forecast Off-trade Sales of RTD Coffee: Volume 2023-2028

Table 102 - Forecast Off-trade Sales of RTD Coffee: Value 2023-2028

Table 103 - Forecast Off-trade Sales of RTD Coffee: % Volume Growth 2023-2028

Table 104 - Forecast Off-trade Sales of RTD Coffee: % Value Growth 2023-2028

RTD Tea in Slovenia

KEY DATA FINDINGS

2023 DEVELOPMENTS

Sophisticated tastes and economic conditions shape buying behaviour

Health concerns prompt shift to reduced sugar RTD tea

Pivovarna Union dd retains its lead

PROSPECTS AND OPPORTUNITIES

Healthier RTD tea offers strongest growth opportunities

Functional trend to emerge in RTD tea

Digitalisation trend to shape innovations in RTD category

CATEGORY DATA

Table 105 - Off-trade Sales of RTD Tea by Category: Volume 2018-2023

Table 106 - Off-trade Sales of RTD Tea by Category: Value 2018-2023

Table 107 - Off-trade Sales of RTD Tea by Category: % Volume Growth 2018-2023

Table 108 - Off-trade Sales of RTD Tea by Category: % Value Growth 2018-2023

Table 109 - NBO Company Shares of Off-trade RTD Tea: % Volume 2019-2023

Table 110 - LBN Brand Shares of Off-trade RTD Tea: % Volume 2020-2023

Table 111 - NBO Company Shares of Off-trade RTD Tea: % Value 2019-2023

Table 112 - LBN Brand Shares of Off-trade RTD Tea: % Value 2020-2023

Table 113 - Forecast Off-trade Sales of RTD Tea by Category: Volume 2023-2028

Table 114 - Forecast Off-trade Sales of RTD Tea by Category: Value 2023-2028

Table 115 - Forecast Off-trade Sales of RTD Tea by Category: % Volume Growth 2023-2028

Table 116 - Forecast Off-trade Sales of RTD Tea by Category: % Value Growth 2023-2028

Energy Drinks in Slovenia

KEY DATA FINDINGS

2023 DEVELOPMENTS

Volume growth remains steady in energy drinks

Functional products emerge to meet consumer demands

Private label energy drinks gain appeal due to inflation

PROSPECTS AND OPPORTUNITIES

Weaker outlook ahead for energy drinks

Flavour variations to play an important role

Roiss Dva expected to retain its lead in upcoming period

CATEGORY DATA

Table 117 - Off-trade Sales of Energy Drinks: Volume 2018-2023

Table 118 - Off-trade Sales of Energy Drinks: Value 2018-2023

Table 119 - Off-trade Sales of Energy Drinks: % Volume Growth 2018-2023

Table 120 - Off-trade Sales of Energy Drinks: % Value Growth 2018-2023

Table 121 - NBO Company Shares of Off-trade Energy Drinks: % Volume 2019-2023

Table 122 - LBN Brand Shares of Off-trade Energy Drinks: % Volume 2020-2023

Table 123 - NBO Company Shares of Off-trade Energy Drinks: % Value 2019-2023

Table 124 - LBN Brand Shares of Off-trade Energy Drinks: % Value 2020-2023

Table 125 - Forecast Off-trade Sales of Energy Drinks: Volume 2023-2028

Table 126 - Forecast Off-trade Sales of Energy Drinks: Value 2023-2028

Table 127 - Forecast Off-trade Sales of Energy Drinks: % Volume Growth 2023-2028

Table 128 - Forecast Off-trade Sales of Energy Drinks: % Value Growth 2023-2028

Sports Drinks in Slovenia

KEY DATA FINDINGS

2023 DEVELOPMENTS

Health and fitness routines trigger sports drinks consumption

Sports drinks consumption remains upbeat despite price rises

Innovation focuses on functional benefits

PROSPECTS AND OPPORTUNITIES

Positive growth driven by active lifestyles and natural ingredients

Sustainability trend to shape product and packaging development

Consumers to seek sports drinks that align with their health and fitness goals

CATEGORY DATA

Table 129 - Off-trade Sales of Sports Drinks: Volume 2018-2023

Table 130 - Off-trade Sales of Sports Drinks: Value 2018-2023

Table 131 - Off-trade Sales of Sports Drinks: % Volume Growth 2018-2023

Table 132 - Off-trade Sales of Sports Drinks: % Value Growth 2018-2023

Table 133 - NBO Company Shares of Off-trade Sports Drinks: % Volume 2019-2023

Table 134 - LBN Brand Shares of Off-trade Sports Drinks: % Volume 2020-2023

Table 135 - NBO Company Shares of Off-trade Sports Drinks: % Value 2019-2023

Table 136 - LBN Brand Shares of Off-trade Sports Drinks: % Value 2020-2023

Table 137 - Forecast Off-trade Sales of Sports Drinks: Volume 2023-2028

Table 138 - Forecast Off-trade Sales of Sports Drinks: Value 2023-2028

Table 139 - Forecast Off-trade Sales of Sports Drinks: % Volume Growth 2023-2028

Table 140 - Forecast Off-trade Sales of Sports Drinks: % Value Growth 2023-2028

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/soft-drinks-in-slovenia/report.