

**Food For Thought (FFT)
Strategic Information Services**

The Soft Drinks & Juices Market in Slovakia

2009 Edition

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FOREWORD

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OVERALL DEFINITIONS

- General:** Market data refer to all products sold for final human consumption in retail, foodservice and artisanal markets (own-produced for own sale, e.g. independent bakers), thus excluding industrial and intermediate consumption, and auto-consumption.
- Product:** All product markets are carefully defined so as to be comparable across all countries. Special cases in a few country and product markets are specified.
- Prices:** Retail prices (including VAT, excise and other indirect taxes) and foodservice buy-in prices are applied throughout.

METHODOLOGY

All countries are surveyed in the field regularly, during which extensive company and other interviews are carried out. FFT also systematically gathers all publicly available data (from trade associations, government institutions and publications, the press and other media). The definition above (final human consumption) ensures that there is no double-counting among product markets. In turn, this enables comparisons across all country/product markets on a per capita or unit value or real growth basis, and allows all data to be summed by product, by country, or by category, allowing extensive cross-checking for verisimilitude. Foodservice Markets: The total (retail + foodservice) human consumption market is established first. An estimate of the food-service market share, derived from multiple sources and industry interviews, is then applied to this total. Owing to the extremely fragmented nature of the foodservice market, specific foodservice surveys are not considered feasible or reliable.

FULL COVERAGE

There are NO gaps. Volume, Value and Company Market Share data are provided for ALL country and product markets. FFT provides its own carefully assessed estimates in the absence of any available data source.

DATA COLLECTION PRINCIPLES

- 1 End-Use Definition:** Final Human Consumption (see above). This ensures NO double-counting and that any and all data can be added up.
- 2 Wide Coverage:** All demand & supply - including retail, foodservice and direct supply - provides a fixed frame into which all elements must fit in a logical manner.
- 3 The 100% Rule:** Company market shares must add up to no more than 100%, and wide coverage means that all significant supplier market shares must be fitted in, squeezing many company claims!
- 4 Cross-checking:** To ensure verisimilitude, extensive country comparisons are made of per capita consumption and expenditure, real growth rates, etc., and against 10-year historical trends. Data "outliers" are singled out, and if necessary re-checked in the field.
- 5 Critical Review:** All publicly available data - the trade press, associations, government surveys, etc., are exhaustively collected & collated, and many amended or rejected, applying the above principles.
- 6 Original Sourcing:** Extensive field surveys, company interviews and store checks are carried out every year, and all data is "fitted" to a realistic overall picture of total supply and demand.
- 7 Software:** Complex, internally-developed computer programs provide a unique dynamic interlocking data grid.
- 8 Russian Doll:** Internal consistency and coherence is provided by data adjusting automatically to data changes elsewhere.
- 9 Client Feedback:** Continual improvements are incorporated in each annual edition at clients' suggestions and remarks, thus fine-tuning the database to market realities.
- 10 Strategic View:** Strategic View: Presentation techniques favoring a global vision of food & drink markets are systematically applied.

THE SOFT DRINKS & JUICES MARKET IN SLOVAKIA

TABLE OF CONTENTS

| | |
|--|-----------|
| Summary Market Tables | 7 |
| 2003 Total Expenditure | 7 |
| Slovakia and 1-Country Total | 7 |
| 2008 Total Expenditure | 8 |
| Slovakia and 1-Country Total | 8 |
| 2008 Retail Expenditure | 9 |
| Slovakia and 1-Country Total | 9 |
| 2008 Foodservice Expenditure | 10 |
| Slovakia and 1-Country Total | 10 |
| 2003-2008 Value Growth Rates | 11 |
| Slovakia and 1-Country Total | 11 |
| 2003-2008 Per Capita Growth Rates | 12 |
| Slovakia and 1-Country Total | 12 |
| 2008 Retail Market Share | 13 |
| Slovakia and 1-Country Total | 13 |
| 2008 Foodservice Market Share | 14 |
| Slovakia and 1-Country Total | 14 |
| 2008 Total Retail Market Share | 15 |
| Slovakia and 1-Country Total | 15 |
| 2008 Total Foodservice Market Share | 16 |
| Slovakia and 1-Country Total | 16 |
| | |
| Demand and Supply by Product | 17 |
| 17. All Soft Drinks & Juices Market Profile | 19 |
| Periscope for All Soft Drinks & Juices in Slovakia | 19 |
| Summary Flowchart of Major Suppliers, Demand and Distribution Channels | |
| Introduction, All Soft Drinks & Juices, Slovakia | 20 |
| Detailed product definition, including local market particularities | |
| 5-year regional and 25-country real annual % value total forecasts, 2008-2013 | |
| Strategic Assessment: Comparative 25-country total data (N.America, W.+E. Europe) for all market data below provided | |
| Total Market Volume, All Soft Drinks & Juices, Slovakia | 20 |
| Retail, Foodservice and Total Demand, 2003, 2007 and 2008 | |
| Total demand 5-year growth rates, 2003-2008 | |
| Per capita retail, foodservice and total market consumption, 2008 | |
| Total Market Value, All Soft Drinks & Juices, Slovakia | 20 |
| Retail, Foodservice and Total Demand, in Slovak Korunas and Euros, 2003, 2007 and 2008 | |
| Total demand real 5-year growth rates, 2003-2008 | |
| Per capita retail, foodservice and total market expenditure, 2008 | |
| Company Market Shares, All Soft Drinks & Juices, Slovakia | 21 |
| Up to Top-10 Ultimate Holding Company Market Shares (updated monthly) | |
| Who owns Whom: Key Local Subsidiary given for each Holding Company | |
| Distribution Channels, All Soft Drinks & Juices, Slovakia | 21 |

| | |
|--|-----------|
| Distribution Channel % Shares: Branded, Unbranded, Own Label and Artisanal, 2009 | 21 |
| 17.1 Mineral Water Market Profile | 23 |
| Periscope for Mineral Water in Slovakia | 23 |
| Summary Flowchart of Major Suppliers, Demand and Distribution Channels | |
| Introduction, Mineral Water, Slovakia | 24 |
| Detailed product definition, including local market particularities | |
| 5-year regional and 25-country real annual % value total forecasts, 2008-2013 | |
| Strategic Assessment: Comparative 25-country total data (N.America, W.+E. Europe) for all market data below provided | |
| Total Market Volume, Mineral Water, Slovakia | 24 |
| Retail, Foodservice and Total Demand, 2003, 2007 and 2008 | |
| Total demand 5-year growth rates, 2003-2008 | |
| Per capita retail, foodservice and total market consumption, 2008 | |
| Total Market Value, Mineral Water, Slovakia | 24 |
| Retail, Foodservice and Total Demand, in Slovak Korunas and Euros, 2003, 2007 and 2008 | |
| Total demand real 5-year growth rates, 2003-2008 | |
| Per capita retail, foodservice and total market expenditure, 2008 | |
| Company Market Shares, Mineral Water, Slovakia | 25 |
| Up to Top-10 Ultimate Holding Company Market Shares (updated monthly) | |
| Who owns Whom: Key Local Subsidiary given for each Holding Company | |
| Distribution Channels, Mineral Water, Slovakia | 25 |
| Distribution Channel % Shares: Branded, Unbranded, Own Label and Artisanal, 2009 | |
| Major Brands, Mineral Water, Slovakia | 26 |
| Major Brands Listing by Company and Subsidiary, 2009 | |
| 17.2 Soft Drinks Market Profile | 27 |
| Periscope for Soft Drinks in Slovakia | 27 |
| Summary Flowchart of Major Suppliers, Demand and Distribution Channels | |
| Introduction, Soft Drinks, Slovakia | 28 |
| Detailed product definition, including local market particularities | |
| 5-year regional and 25-country real annual % value total forecasts, 2008-2013 | |
| Strategic Assessment: Comparative 25-country total data (N.America, W.+E. Europe) for all market data below provided | |
| Total Market Volume, Soft Drinks, Slovakia | 28 |
| Retail, Foodservice and Total Demand, 2003, 2007 and 2008 | |
| Total demand 5-year growth rates, 2003-2008 | |
| Per capita retail, foodservice and total market consumption, 2008 | |
| Total Market Value, Soft Drinks, Slovakia | 28 |
| Retail, Foodservice and Total Demand, in Slovak Korunas and Euros, 2003, 2007 and 2008 | |
| Total demand real 5-year growth rates, 2003-2008 | |
| Per capita retail, foodservice and total market expenditure, 2008 | |
| Company Market Shares, Soft Drinks, Slovakia | 29 |
| Up to Top-10 Ultimate Holding Company Market Shares (updated monthly) | |
| Who owns Whom: Key Local Subsidiary given for each Holding Company | |
| Distribution Channels, Soft Drinks, Slovakia | 29 |
| Distribution Channel % Shares: Branded, Unbranded, Own Label and Artisanal, 2009 | |
| Major Brands, Soft Drinks, Slovakia | 30 |

| | |
|--|-----------|
| Major Brands Listing by Company and Subsidiary, 2009 | 30 |
| 17.3 Fruit Juices and Drinks Market Profile | 31 |
| Periscope for Fruit Juices and Drinks in Slovakia | 31 |
| Summary Flowchart of Major Suppliers, Demand and Distribution Channels | |
| Introduction, Fruit Juices and Drinks, Slovakia | 32 |
| Detailed product definition, including local market particularities | |
| 5-year regional and 25-country real annual % value total forecasts, 2008-2013 | |
| Strategic Assessment: Comparative 25-country total data (N.America, W.+E. Europe) for all market data below provided | |
| Total Market Volume, Fruit Juices and Drinks, Slovakia | 32 |
| Retail, Foodservice and Total Demand, 2003, 2007 and 2008 | |
| Total demand 5-year growth rates, 2003-2008 | |
| Per capita retail, foodservice and total market consumption, 2008 | |
| Total Market Value, Fruit Juices and Drinks, Slovakia | 32 |
| Retail, Foodservice and Total Demand, in Slovak Korunas and Euros, 2003, 2007 and 2008 | |
| Total demand real 5-year growth rates, 2003-2008 | |
| Per capita retail, foodservice and total market expenditure, 2008 | |
| Company Market Shares, Fruit Juices and Drinks, Slovakia | 33 |
| Up to Top-10 Ultimate Holding Company Market Shares (updated monthly) | |
| Who owns Whom: Key Local Subsidiary given for each Holding Company | |
| Distribution Channels, Fruit Juices and Drinks, Slovakia | 33 |
| Distribution Channel % Shares: Branded, Unbranded, Own Label and Artisanal, 2009 | |
| 17.31 Fruit Juices Market Profile | 35 |
| Periscope for Fruit Juices in Slovakia | 35 |
| Summary Flowchart of Major Suppliers, Demand and Distribution Channels | |
| Introduction, Fruit Juices, Slovakia | 36 |
| Detailed product definition, including local market particularities | |
| 5-year regional and 25-country real annual % value total forecasts, 2008-2013 | |
| Strategic Assessment: Comparative 25-country total data (N.America, W.+E. Europe) for all market data below provided | |
| Total Market Volume, Fruit Juices, Slovakia | 36 |
| Retail, Foodservice and Total Demand, 2003, 2007 and 2008 | |
| Total demand 5-year growth rates, 2003-2008 | |
| Per capita retail, foodservice and total market consumption, 2008 | |
| Total Market Value, Fruit Juices, Slovakia | 36 |
| Retail, Foodservice and Total Demand, in Slovak Korunas and Euros, 2003, 2007 and 2008 | |
| Total demand real 5-year growth rates, 2003-2008 | |
| Per capita retail, foodservice and total market expenditure, 2008 | |
| Company Market Shares, Fruit Juices, Slovakia | 37 |
| Up to Top-10 Ultimate Holding Company Market Shares (updated monthly) | |
| Who owns Whom: Key Local Subsidiary given for each Holding Company | |
| Distribution Channels, Fruit Juices, Slovakia | 37 |
| Distribution Channel % Shares: Branded, Unbranded, Own Label and Artisanal, 2009 | |
| Major Brands, Fruit Juices, Slovakia | 38 |
| Major Brands Listing by Company and Subsidiary, 2009 | |
| 17.32 Fruit Drinks Market Profile | 39 |

| | |
|--|-----------|
| Periscope for Fruit Drinks in Slovakia | 39 |
| Summary Flowchart of Major Suppliers, Demand and Distribution Channels | |
| Introduction, Fruit Drinks, Slovakia | 40 |
| Detailed product definition, including local market particularities | |
| 5-year regional and 25-country real annual % value total forecasts, 2008-2013 | |
| Strategic Assessment: Comparative 25-country total data (N.America, W.+E. Europe) for all market data below provided | |
| Total Market Volume, Fruit Drinks, Slovakia | 40 |
| Retail, Foodservice and Total Demand, 2003, 2007 and 2008 | |
| Total demand 5-year growth rates, 2003-2008 | |
| Per capita retail, foodservice and total market consumption, 2008 | |
| Total Market Value, Fruit Drinks, Slovakia | 40 |
| Retail, Foodservice and Total Demand, in Slovak Korunas and Euros, 2003, 2007 and 2008 | |
| Total demand real 5-year growth rates, 2003-2008 | |
| Per capita retail, foodservice and total market expenditure, 2008 | |
| Company Market Shares, Fruit Drinks, Slovakia | 41 |
| Up to Top-10 Ultimate Holding Company Market Shares (updated monthly) | |
| Who owns Whom: Key Local Subsidiary given for each Holding Company | |
| Distribution Channels, Fruit Drinks, Slovakia | 41 |
| Distribution Channel % Shares: Branded, Unbranded, Own Label and Artisanal, 2009 | |
| Major Brands, Fruit Drinks, Slovakia | 42 |
| Major Brands Listing by Company and Subsidiary, 2009 | |
| 17.4 Squashes and Concentrates Market Profile | 43 |
| Periscope for Squashes and Concentrates in Slovakia | 43 |
| Summary Flowchart of Major Suppliers, Demand and Distribution Channels | |
| Introduction, Squashes and Concentrates, Slovakia | 44 |
| Detailed product definition, including local market particularities | |
| 5-year regional and 25-country real annual % value total forecasts, 2008-2013 | |
| Strategic Assessment: Comparative 25-country total data (N.America, W.+E. Europe) for all market data below provided | |
| Total Market Volume, Squashes and Concentrates, Slovakia | 44 |
| Retail, Foodservice and Total Demand, 2003, 2007 and 2008 | |
| Total demand 5-year growth rates, 2003-2008 | |
| Per capita retail, foodservice and total market consumption, 2008 | |
| Total Market Value, Squashes and Concentrates, Slovakia | 44 |
| Retail, Foodservice and Total Demand, in Slovak Korunas and Euros, 2003, 2007 and 2008 | |
| Total demand real 5-year growth rates, 2003-2008 | |
| Per capita retail, foodservice and total market expenditure, 2008 | |
| Company Market Shares, Squashes and Concentrates, Slovakia | 45 |
| Up to Top-10 Ultimate Holding Company Market Shares (updated monthly) | |
| Who owns Whom: Key Local Subsidiary given for each Holding Company | |
| Distribution Channels, Squashes and Concentrates, Slovakia | 45 |
| Distribution Channel % Shares: Branded, Unbranded, Own Label and Artisanal, 2009 | |
| Major Brands, Squashes and Concentrates, Slovakia | 46 |
| Major Brands Listing by Company and Subsidiary, 2009 | |
| 17.5 Health & Sports Drinks Market Profile | 47 |

| | |
|--|-----------|
| Periscope for Health & Sports Drinks in Slovakia | 47 |
| Summary Flowchart of Major Suppliers, Demand and Distribution Channels | |
| Introduction, Health & Sports Drinks, Slovakia | 48 |
| Detailed product definition, including local market particularities | |
| 5-year regional and 25-country real annual % value total forecasts, 2008-2013 | |
| Strategic Assessment: Comparative 25-country total data (N.America, W.+E. Europe) for all market data below provided | |
| Total Market Volume, Health & Sports Drinks, Slovakia | 48 |
| Retail, Foodservice and Total Demand, 2003, 2007 and 2008 | |
| Total demand 5-year growth rates, 2003-2008 | |
| Per capita retail, foodservice and total market consumption, 2008 | |
| Total Market Value, Health & Sports Drinks, Slovakia | 48 |
| Retail, Foodservice and Total Demand, in Slovak Korunas and Euros, 2003, 2007 and 2008 | |
| Total demand real 5-year growth rates, 2003-2008 | |
| Per capita retail, foodservice and total market expenditure, 2008 | |
| Company Market Shares, Health & Sports Drinks, Slovakia | 49 |
| Up to Top-10 Ultimate Holding Company Market Shares (updated monthly) | |
| Who owns Whom: Key Local Subsidiary given for each Holding Company | |
| Distribution Channels, Health & Sports Drinks, Slovakia | 49 |
| Distribution Channel % Shares: Branded, Unbranded, Own Label and Artisanal, 2009 | |
| Major Brands, Health & Sports Drinks, Slovakia | 50 |
| Major Brands Listing by Company and Subsidiary, 2009 | |
| 17.6 Iced Tea Market Profile | 51 |
| Periscope for Iced Tea in Slovakia | 51 |
| Summary Flowchart of Major Suppliers, Demand and Distribution Channels | |
| Introduction, Iced Tea, Slovakia | 52 |
| Detailed product definition, including local market particularities | |
| 5-year regional and 25-country real annual % value total forecasts, 2008-2013 | |
| Strategic Assessment: Comparative 25-country total data (N.America, W.+E. Europe) for all market data below provided | |
| Total Market Volume, Iced Tea, Slovakia | 52 |
| Retail, Foodservice and Total Demand, 2003, 2007 and 2008 | |
| Total demand 5-year growth rates, 2003-2008 | |
| Per capita retail, foodservice and total market consumption, 2008 | |
| Total Market Value, Iced Tea, Slovakia | 52 |
| Retail, Foodservice and Total Demand, in Slovak Korunas and Euros, 2003, 2007 and 2008 | |
| Total demand real 5-year growth rates, 2003-2008 | |
| Per capita retail, foodservice and total market expenditure, 2008 | |
| Company Market Shares, Iced Tea, Slovakia | 53 |
| Up to Top-10 Ultimate Holding Company Market Shares (updated monthly) | |
| Who owns Whom: Key Local Subsidiary given for each Holding Company | |
| Distribution Channels, Iced Tea, Slovakia | 53 |
| Distribution Channel % Shares: Branded, Unbranded, Own Label and Artisanal, 2009 | |
| Major Brands, Iced Tea, Slovakia | 54 |
| Major Brands Listing by Company and Subsidiary, 2009 | |

| | |
|--|-----------|
| Company Profiles in Slovakia | 55 |
| ALL companies and subsidiaries identified in the markets covered listed | |
| Holding Company Country and Product Market Shares & Rankings (updated monthly) | |
| Note: Applying 2009 Company Market Shares to 2008 Market Value data | |
| ABN Amro to Dobrá Voda | 56 |
| Drinks Market to Frucona Kosice | 57 |
| Fructal to Jan Sofranko | 58 |
| Jan Sofranko to Linea Nivnice | 59 |
| Lunaco to Merina | 60 |
| Milkagro to Noko | 61 |
| Noko to Pfaner | 62 |
| Pinelli to Slovcandy Haas | 63 |
| TMV to Zdravilisce Radenci | 64 |
| | |
| Major Brands And 'Who Owns Whom' in Slovakia | 65 |
| Holding Companies, Key Local Subsidiaries and Major Brands systematically identified by product and country | |
| Major Brands by Product Market | 67 |
| 17.1 Mineral Water | 67 |
| 17.2 Soft Drinks | 67 |
| 17.31 Fruit Juices | 67 |
| 17.32 Fruit Drinks | 67 |
| 17.4 Squashes and Concentrates | 68 |
| 17.5 Health & Sports Drinks | 68 |
| 17.6 Iced Tea | 68 |
| Major Brands by Holding Company | 69 |
| ABN Amro to Milo Holding | 69 |
| Milo Holding to Zdravilisce Radenci | 70 |