



Euromonitor
International

RTD Coffee in Croatia

December 2025

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KEY DATA FINDINGS

2025 DEVELOPMENTS

Rising seasonal demand and innovation drive growth

INDUSTRY PERFORMANCE

RTD coffee is still in its early adoption phase

WHAT'S NEXT?

Rosy outlook over the forecast period

Advancements in production, distribution, and digital engagement position RTD coffee as a modern, lifestyle-driven category

COMPETITIVE LANDSCAPE

Ennstal Milch leads, providing a reliable, high-quality, and indulgent product

Franck is the most dynamic player, bridging its heritage with modern trends

CHANNELS

Combined dominance of small local grocers and forecourt retailers as the market is heavily driven by on-the-go consumption

Vending benefits from consumers increasingly seeking convenient, on-the-go coffee

CATEGORY DATA

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EXECUTIVE SUMMARY

Steady expansion, with rising demand in several key categories

KEY DATA FINDINGS

INDUSTRY PERFORMANCE

Innovation is faster, riskier, and more culturally embedded

Affordability reshapes competitive dynamics

Functional beverages and health benefits drive premium growth

WHAT'S NEXT?

Volume growth driven by tourism, lifestyle shifts, and continuous innovation

Both local and international producers adapt to a mature yet steadily expanding environment

Distribution to become more diversified and digitally connected

COMPETITIVE LANDSCAPE

Through a balance of tradition, innovation, and premiumisation, Jamnica secures its leading position
Diversification and functional product development drive growth of Vindija
Soft drinks becomes more competitive and diversified

CHANNELS

Supermarkets maintain their clear lead, combining scale, variety, and promotional power
Accelerating shift toward digital convenience and hybrid shopping habits
Foodservice vs retail split

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