



Euromonitor
International

Hot Drinks in Croatia

December 2025

Table of Contents

EXECUTIVE SUMMARY

Hot drinks' cultural importance, adaptive product strategies, and resilient domestic producers ensure continued value expansion

KEY DATA FINDINGS

INDUSTRY PERFORMANCE

Rising prices and consumer frustration

Selective premiumisation persists, supported by tourism and functional innovation

Affordable sustainability emerges as an important trend

Coffee retains its central position in hot drinks

WHAT'S NEXT?

Price-driven value growth, with volumes remaining largely stable

Company activity will centre on cost management, technological advancement, and adaptive innovation

Gradual diversification of retail channels, reflecting Croatia's evolving shopping habits and tourism-driven demand

COMPETITIVE LANDSCAPE

Frank maintains its lead, supported by its strong heritage, diversified product portfolio, and continuous innovation

Local companies dominate, benefiting from trust, tradition, and adaptability

CHANNELS

Supermarkets lead with their wide product assortments, regular promotions, and accessibility

Sunday trading restrictions and tourism drive dynamic growth of forecourt retailers

E-commerce offers quick delivery and access to products not always available in physical stores

Foodservice vs retail split

MARKET DATA

Table 1 - Sales of Hot Drinks by Retail vs Foodservice: % Volume Breakdown 2020-2025

Table 2 - Sales of Hot Drinks by Retail vs Foodservice: % Volume Growth 2020-2025

Table 3 - Retail Sales of Hot Drinks by Category: Volume 2020-2025

Table 4 - Retail Sales of Hot Drinks by Category: Value 2020-2025

Table 5 - Retail Sales of Hot Drinks by Category: % Volume Growth 2020-2025

Table 6 - Retail Sales of Hot Drinks by Category: % Value Growth 2020-2025

Table 7 - Foodservice Sales of Hot Drinks by Category: Volume 2020-2025

Table 8 - Foodservice Sales of Hot Drinks by Category: % Volume Growth 2020-2025

Table 9 - Total Sales of Hot Drinks by Category: Total Volume 2020-2025

Table 10 - Total Sales of Hot Drinks by Category: % Total Volume Growth 2020-2025

Table 11 - NBO Company Shares of Hot Drinks: % Retail Value 2021-2025

Table 12 - LBN Brand Shares of Hot Drinks: % Retail Value 2022-2025

Table 13 - Penetration of Private Label in Hot Drinks by Category: % Retail Value 2020-2025

Table 14 - Retail Distribution of Hot Drinks by Format: % Volume 2020-2025

Table 15 - Retail Distribution of Hot Drinks by Format and Category: % Volume 2025

Table 16 - Forecast Sales of Hot Drinks by Retail vs Foodservice: % Volume Breakdown 2025-2030

Table 17 - Forecast Sales of Hot Drinks by Retail vs Foodservice: % Volume Growth 2025-2030

Table 18 - Forecast Retail Sales of Hot Drinks by Category: Volume 2025-2030

Table 19 - Forecast Retail Sales of Hot Drinks by Category: Value 2025-2030

Table 20 - Forecast Retail Sales of Hot Drinks by Category: % Volume Growth 2025-2030

Table 21 - Forecast Retail Sales of Hot Drinks by Category: % Value Growth 2025-2030

Table 22 - Forecast Foodservice Sales of Hot Drinks by Category: Volume 2025-2030

Table 23 - Forecast Foodservice Sales of Hot Drinks by Category: % Volume Growth 2025-2030

Table 24 - Forecast Total Sales of Hot Drinks by Category: Total Volume 2025-2030

Table 25 - Forecast Total Sales of Hot Drinks by Category: % Total Volume Growth 2025-2030

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SOURCES

Summary 1 - Research Sources

[Coffee in Croatia](#)

KEY DATA FINDINGS

2025 DEVELOPMENTS

Sustained consumer attachment to coffee

INDUSTRY PERFORMANCE

Strong value growth reflects inflationary effects and structural market shifts

Fresh ground coffee pods valued for their convenience and quality

WHAT'S NEXT?

High prices, innovation, and enduring consumer loyalty ensure further expansion

Shift toward technology-led efficiency and innovation

Sustainability increasingly important, reflecting both global commitments and local consumer awareness

COMPETITIVE LANDSCAPE

Franck remains the clear leader in an increasingly competitive coffee landscape

Franck's broad portfolio allows it to capture growth in both traditional and premium categories

CHANNELS

Supermarkets lead, offering broad portfolios, private label and promotions

Coffee remains a planned, at-home consumption category

CATEGORY DATA

Table 26 - Retail Sales of Coffee by Category: Volume 2020-2025

Table 27 - Retail Sales of Coffee by Category: Value 2020-2025

Table 28 - Retail Sales of Coffee by Category: % Volume Growth 2020-2025

Table 29 - Retail Sales of Coffee by Category: % Value Growth 2020-2025

Table 30 - NBO Company Shares of Coffee: % Retail Value 2021-2025

Table 31 - LBN Brand Shares of Coffee: % Retail Value 2022-2025

Table 32 - Forecast Retail Sales of Coffee by Category: Volume 2025-2030

Table 33 - Forecast Retail Sales of Coffee by Category: Value 2025-2030

Table 34 - Forecast Retail Sales of Coffee by Category: % Volume Growth 2025-2030

Table 35 - Forecast Retail Sales of Coffee by Category: % Value Growth 2025-2030

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[Tea in Croatia](#)

KEY DATA FINDINGS

2025 DEVELOPMENTS

Wellness trends, moderate premiumisation, and higher unit prices drive growth

INDUSTRY PERFORMANCE

Tea's reputation as a health-oriented beverage and innovation support demand

Consumers increasingly turn to herbal teas for their perceived health benefits

WHAT'S NEXT?

Modest growth supported by wellness-oriented consumption and stable consumer habits

Gradual digital transformation

COMPETITIVE LANDSCAPE

Franck benefits from an extensive distribution network, strong consumer trust and innovation

Podravka successfully focuses on teas that align with consumers' health and wellness priorities

CHANNELS

Leading supermarkets offer a wide product selection, competitive pricing, and convenience

Sunday trading restrictions drive growth of forecourt retailers

CATEGORY DATA

Table 36 - Retail Sales of Tea by Category: Volume 2020-2025

Table 37 - Retail Sales of Tea by Category: Value 2020-2025

Table 38 - Retail Sales of Tea by Category: % Volume Growth 2020-2025

Table 39 - Retail Sales of Tea by Category: % Value Growth 2020-2025

Table 40 - NBO Company Shares of Tea: % Retail Value 2021-2025

Table 41 - LBN Brand Shares of Tea: % Retail Value 2022-2025

Table 42 - Forecast Retail Sales of Tea by Category: Volume 2025-2030

Table 43 - Forecast Retail Sales of Tea by Category: Value 2025-2030

Table 44 - Forecast Retail Sales of Tea by Category: % Volume Growth 2025-2030

Table 45 - Forecast Retail Sales of Tea by Category: % Value Growth 2025-2030

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[Other Hot Drinks in Croatia](#)

KEY DATA FINDINGS

2025 DEVELOPMENTS

Rising prices and demand for comfort-oriented drinks support value gains

INDUSTRY PERFORMANCE

Chocolate-based flavoured powder drinks remain the dominant category

Innovation in reduced sugar or fortified versions helps sustain demand

WHAT'S NEXT?

Volume growth limited by demographic decline and growing awareness of sugar

Advancements in production technology, product reformulation, and digital distribution

COMPETITIVE LANDSCAPE

Nesquik retains high household penetration thanks to its trusted image, consistent quality, and wide distribution

Dr Oetker benefits from strong brand trust and steady demand

CHANNELS

Consumers value supermarkets' wide assortments, promotions, and convenience

Forecourt retailers benefit from Sunday trading restrictions and improved product assortments

CATEGORY DATA

Table 46 - Retail Sales of Other Hot Drinks by Category: Volume 2020-2025

Table 47 - Retail Sales of Other Hot Drinks by Category: Value 2020-2025

Table 48 - Retail Sales of Other Hot Drinks by Category: % Volume Growth 2020-2025

Table 49 - Retail Sales of Other Hot Drinks by Category: % Value Growth 2020-2025

Table 50 - NBO Company Shares of Other Hot Drinks: % Retail Value 2021-2025

Table 51 - LBN Brand Shares of Other Hot Drinks: % Retail Value 2022-2025

Table 52 - Forecast Retail Sales of Other Hot Drinks by Category: Volume 2025-2030

Table 53 - Forecast Retail Sales of Other Hot Drinks by Category: Value 2025-2030

Table 54 - Forecast Retail Sales of Other Hot Drinks by Category: % Volume Growth 2025-2030

Table 55 - Forecast Retail Sales of Other Hot Drinks by Category: % Value Growth 2025-2030

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