



# Other Hot Drinks in Croatia

December 2025

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## Other Hot Drinks in Croatia - Category analysis

### 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

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## Hot Drinks in Croatia - Industry Overview

### 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  
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