

Nicotine in Croatia

July 2026

Table of Contents

EXECUTIVE SUMMARY

2025 Developments

KEY DATA INSIGHTS

INDUSTRY PERFORMANCE

Excise Increases and Flavour Bans Drive Consumer Downtrading

Cigarettes Maintain Dominance as Heated Tobacco Accelerates

Bat Consolidates Multi-Format Strategy to Boost Switching and Retention

Chart 1 - Volume Sales 2020-2030

Chart 2 - Volume Sales by Category 2025

WHAT'S NEXT?

Bat to Expand Regional Supply Base as Demand Outpaces Western Europe

Retailers to Adopt Age-Verification Technology as Compliance Tightens

Tourism and Cross-Border Flows to Reshape Demand and Business Models

Chart 3 - Forecast Volume Sales 2020-2030

Chart 4 - Forecast Volume Sales by Category 2025-2030

COMPETITIVE LANDSCAPE

Bat Defends Lead as New Formats Gain Relevance

Chart 5 - Company Shares 2025

Chart 6 - Brand Shares 2025

CHANNELS

Small Local Grocers Sustain Habitual Nicotine Purchases

Regulatory Barriers Restrict E-Commerce to a Marginal Role

OPERATING ENVIRONMENT

Legislation

Legislative Overview

Chart 7 - Legislation Summary at a Glance

Minimum Legal Smoking Age

Smoking Prevalence

Tar Levels

Health Warnings

Plain Packaging

Advertising and Sponsorship

Point-Of-Sale Display Bans

Smoking in Public Places

Low Ignition Propensity (Lip) Cigarette Regulation

Flavoured Tobacco Product Ban

Reduced Harm

Vapour Products

PRODUCTION/IMPORTS/EXPORTS

ECONOMIC CONTEXT

Chart 8 - Economic Context for Nicotine

Chart 9 - Real Gdp Growth 2020-2030

Chart 10 - Inflation 2020-2030

CONSUMER CONTEXT

Chart 11 - Consumer Context for Nicotine
Chart 12 - Population 2020-2030
Chart 13 - Population by Generation 2025

COUNTRY REPORTS DISCLAIMER

[Cigarettes in Croatia](#)

KEY DATA INSIGHTS

2025 DEVELOPMENTS

Cigarettes Summary

INDUSTRY PERFORMANCE

British American Tobacco Deploys Ai at Kiosks to Enhance Compliance
Government Excise Hike Prompts Value-Driven Purchasing Decisions
Cross-Border Shopping and Tourism Sustain Sales Despite Economic Pressure
Chart 14 - Volume Sales 2020-2030

WHAT'S NEXT?

Kiosks to Adopt Compliance Technology to Sustain Brand Visibility
Chart 15 - Forecast Volume Sales 2020-2030

COMPETITIVE LANDSCAPE

Top Companies Retain Dominance as Excise-Driven Pricing Shapes Competition
Chart 16 - Company Shares 2025
Chart 17 - Brand Shares 2025

CHANNELS

Small Local Grocers Strengthen Their Lead as Regulations Tighten
Heavily Restricted Online Sales Leave Physical Retail Unchallenged
Chart 18 - Retail Channels 2020-2025

TAXATION AND PRICING

Taxation Rates
Average Cigarette Pack Price Breakdown
Chart 19 - Cigarette Price Band Definitions

ECONOMIC CONTEXT

Chart 20 - Economic Context for Cigarettes
Chart 21 - Real Gdp Growth 2020-2030
Chart 22 - Inflation 2020-2030

CONSUMER CONTEXT

Chart 23 - Consumer Context for Cigarettes
Chart 24 - Population 2020-2030
Chart 25 - Population by Generation 2025

COUNTRY REPORTS DISCLAIMER

[Cigars, Cigarillos and Smoking Tobacco in Croatia](#)

KEY DATA INSIGHTS

2025 DEVELOPMENTS

INDUSTRY PERFORMANCE

Rising Excise Duties Drive Downtrading to Fine-Cut and Illicit Tobacco

Excise Hikes Accelerate Illicit Trade and Reshape Retail Compliance

Chart 26 - Volume Sales 2020-2030

Chart 27 - Volume Sales by Category 2025

WHAT'S NEXT?

Specialist Retailers to Drive Premium Growth as Daily Use Declines

Experiential Retail and Channel Focus to Shape Premium Brand Relevance

Chart 28 - Forecast Volume Sales 2020-2030

Chart 29 - Forecast Volume Sales by Category 2025-2030

COMPETITIVE LANDSCAPE

Jt Outpaces Bat as Share Leadership Shifts

Chart 30 - Company Shares 2025

Chart 31 - Brand Shares 2025

CHANNELS

Specialists and Grocers Adapt as Forecourts Capture Weekend Demand

Regulations Keep E-Commerce Marginal as Offline Stores Retain Loyalty

ECONOMIC CONTEXT

Chart 32 - Economic Context for Cigars, Cigarillos and Smoking Tobacco

Chart 33 - Real Gdp Growth 2020-2030

Chart 34 - Inflation 2020-2030

CONSUMER CONTEXT

Chart 35 - Consumer Context for Cigars, Cigarillos and Smoking Tobacco

Chart 36 - Population 2020-2030

Chart 37 - Population by Generation 2025

COUNTRY REPORTS DISCLAIMER

[Smokeless Tobacco, E-Vapour Products and Heated Tobacco in Croatia](#)

KEY DATA INSIGHTS

2025 DEVELOPMENTS

Smokeless Tobacco, E-Vapour Products and Heated Tobacco Summary

INDUSTRY PERFORMANCE

Bat Leverages Omni Platform to Drive Cross-Format Adoption

E-Liquid Tax Prompts Shift to Refillables and Informal Supply

Chart 38 - Volume Sales 2020-2030

Chart 39 - Volume Sales by Category 2025

WHAT'S NEXT?

Consumers to Prioritise Usability as Regulatory Tightening Limits New Entries

Excise Increases and Flavour Bans to Accelerate Shift to Informal Channels

Chart 40 - Forecast Volume Sales 2020-2030

Chart 41 - Forecast Volume Sales by Category 2025-2030

COMPETITIVE LANDSCAPE

Top Companies Maintain Stable Shares through Strong Brand Presence and Consistency

Chart 42 - Company Shares 2025

Chart 43 - Brand Shares 2025

CHANNELS

Specialist Retailers Sustain Lead as Excise Prompts Channel Shift

Specialist Webshops Face Limits as E-Commerce Adoption Remains Slow

ECONOMIC CONTEXT

Chart 44 - Economic Context for Smokeless Tobacco, E-Vapour Products and Heated Tobacco

Chart 45 - Real Gdp Growth 2020-2030

Chart 46 - Inflation 2020-2030

CONSUMER CONTEXT

Chart 47 - Consumer Context for Smokeless Tobacco, E-Vapour Products and Heated Tobacco

Chart 48 - Population 2020-2030

Chart 49 - Population by Generation 2025

COUNTRY REPORTS DISCLAIMER

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/nicotine-in-croatia/report.