



Coffee in Croatia

December 2025

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Coffee in Croatia - Category analysis

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

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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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