



Baked Goods in Croatia

November 2025

Table of Contents

Baked Goods in Croatia - Category analysis

KEY DATA FINDINGS

2025 DEVELOPMENTS

Rising influence of health and wellness concerns

INDUSTRY PERFORMANCE

Higher prices and rising interest in more differentiated products drive value growth in 2025

Freshly baked items remain a cornerstone of Croatia's everyday food culture

WHAT'S NEXT?

Nominal growth driven by inflation and trading-up to more specialised products

Rising influence of health and wellness considerations

Expanded list of controlled food items

COMPETITIVE LANDSCAPE

Mlinar leads thanks to its nationwide reach, brand strength, investment-backed expansion, and continuous innovation

Mondelez benefits from its strong position in packaged sweet bakery products

CHANNELS

Convenience stores and discounters capture growth from changing shopping habits and price sensitivity

E-commerce benefits from the growing digitalisation of grocery retail and consumer preference for convenience

CATEGORY DATA

Table 1 - Sales of Baked Goods by Category: Volume 2020-2025

Table 2 - Sales of Baked Goods by Category: Value 2020-2025

Table 3 - Sales of Baked Goods by Category: % Volume Growth 2020-2025

Table 4 - Sales of Baked Goods by Category: % Value Growth 2020-2025

Table 5 - Sales of Pastries by Type: % Value 2020-2025

Table 6 - NBO Company Shares of Baked Goods: % Value 2021-2025

Table 7 - LBN Brand Shares of Baked Goods: % Value 2022-2025

Table 8 - Distribution of Baked Goods by Format: % Value 2020-2025

Table 9 - Forecast Sales of Baked Goods by Category: Volume 2025-2030

Table 10 - Forecast Sales of Baked Goods by Category: Value 2025-2030

Table 11 - Forecast Sales of Baked Goods by Category: % Volume Growth 2025-2030

Table 12 - Forecast Sales of Baked Goods by Category: % Value Growth 2025-2030

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[Staple Foods in Croatia - Industry Overview](#)

EXECUTIVE SUMMARY

Moderate growth supported by stable demand, health-oriented innovation, and local supply development

KEY DATA FINDINGS

INDUSTRY PERFORMANCE

Private label expansion as economic pressure persists

High global sugar and cocoa prices present challenges for sweet staples

Health and sustainability trends advance

WHAT'S NEXT?

Stable demand, tourism growth and a gradual recovery of purchasing power ensure steady growth

Companies focus on efficiency, innovation, and credibility

Supermarkets and discounters to maintain their dominance

COMPETITIVE LANDSCAPE

Fortenova remained the undisputed leader, combining scale, brand recognition, and distribution strength

Delta Holding SA's strong growth fuelled by its healthy positioning, improved store visibility and affordable pricing

Strong preference for Croatian products

CHANNELS

Supermarkets lead, expanding their private label ranges and strengthening their image as price-conscious, consumer-oriented retailers

E-commerce expansion as major supermarket chains invest in improving digital platforms, delivery logistics, and integration between online and offline promotions

Discounters benefit from consumers' heightened focus on value and price transparency

MARKET DATA

Table 13 - Sales of Staple Foods by Category: Volume 2020-2025

Table 14 - Sales of Staple Foods by Category: Value 2020-2025

Table 15 - Sales of Staple Foods by Category: % Volume Growth 2020-2025

Table 16 - Sales of Staple Foods by Category: % Value Growth 2020-2025

Table 17 - NBO Company Shares of Staple Foods: % Value 2021-2025

Table 18 - LBN Brand Shares of Staple Foods: % Value 2022-2025

Table 19 - Penetration of Private Label by Category: % Value 2021-2025

Table 20 - Distribution of Staple Foods by Format: % Value 2020-2025

Table 21 - Forecast Sales of Staple Foods by Category: Volume 2025-2030

Table 22 - Forecast Sales of Staple Foods by Category: Value 2025-2030

Table 23 - Forecast Sales of Staple Foods by Category: % Volume Growth 2025-2030

Table 24 - Forecast Sales of Staple Foods by Category: % Value Growth 2025-2030

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SOURCES

Summary 1 - Research Sources

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