



**Euromonitor
International**

Hot Drinks in Croatia

December 2025

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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

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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

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Coffee remains a planned, at-home consumption category

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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

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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

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