



# Hot Drinks in Croatia

December 2025

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## Hot Drinks in Croatia

### 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

Supermarkets lead, offering broad portfolios, private label and promotions

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#### [Tea in Croatia](#)

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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

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## 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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