

Other Hot Drinks in Croatia

December 2025

Table of Contents

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

Consumers value supermarkets' wide assortments, promotions, and convenience
Forecourt retailers benefit from Sunday trading restrictions and improved product assortments

CATEGORY DATA

- Table 1 - Retail Sales of Other Hot Drinks by Category: Volume 2020-2025
- Table 2 - Retail Sales of Other Hot Drinks by Category: Value 2020-2025
- Table 3 - Retail Sales of Other Hot Drinks by Category: % Volume Growth 2020-2025
- Table 4 - Retail Sales of Other Hot Drinks by Category: % Value Growth 2020-2025
- Table 5 - NBO Company Shares of Other Hot Drinks: % Retail Value 2021-2025
- Table 6 - LBN Brand Shares of Other Hot Drinks: % Retail Value 2022-2025
- Table 7 - Forecast Retail Sales of Other Hot Drinks by Category: Volume 2025-2030
- Table 8 - Forecast Retail Sales of Other Hot Drinks by Category: Value 2025-2030
- Table 9 - Forecast Retail Sales of Other Hot Drinks by Category: % Volume Growth 2025-2030
- Table 10 - Forecast Retail Sales of Other Hot Drinks by Category: % Value Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

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
Foodservice vs retail split

MARKET DATA

Table 11 - Sales of Hot Drinks by Retail vs Foodservice: % Volume Breakdown 2020-2025
Table 12 - Sales of Hot Drinks by Retail vs Foodservice: % Volume Growth 2020-2025
Table 13 - Retail Sales of Hot Drinks by Category: Volume 2020-2025
Table 14 - Retail Sales of Hot Drinks by Category: Value 2020-2025
Table 15 - Retail Sales of Hot Drinks by Category: % Volume Growth 2020-2025
Table 16 - Retail Sales of Hot Drinks by Category: % Value Growth 2020-2025
Table 17 - Foodservice Sales of Hot Drinks by Category: Volume 2020-2025
Table 18 - Foodservice Sales of Hot Drinks by Category: % Volume Growth 2020-2025
Table 19 - Total Sales of Hot Drinks by Category: Total Volume 2020-2025
Table 20 - Total Sales of Hot Drinks by Category: % Total Volume Growth 2020-2025
Table 21 - NBO Company Shares of Hot Drinks: % Retail Value 2021-2025
Table 22 - LBN Brand Shares of Hot Drinks: % Retail Value 2022-2025
Table 23 - Penetration of Private Label in Hot Drinks by Category: % Retail Value 2020-2025
Table 24 - Retail Distribution of Hot Drinks by Format: % Volume 2020-2025
Table 25 - Retail Distribution of Hot Drinks by Format and Category: % Volume 2025
Table 26 - Forecast Sales of Hot Drinks by Retail vs Foodservice: % Volume Breakdown 2025-2030
Table 27 - Forecast Sales of Hot Drinks by Retail vs Foodservice: % Volume Growth 2025-2030
Table 28 - Forecast Retail Sales of Hot Drinks by Category: Volume 2025-2030
Table 29 - Forecast Retail Sales of Hot Drinks by Category: Value 2025-2030
Table 30 - Forecast Retail Sales of Hot Drinks by Category: % Volume Growth 2025-2030
Table 31 - Forecast Retail Sales of Hot Drinks by Category: % Value Growth 2025-2030
Table 32 - Forecast Foodservice Sales of Hot Drinks by Category: Volume 2025-2030
Table 33 - Forecast Foodservice Sales of Hot Drinks by Category: % Volume Growth 2025-2030
Table 34 - Forecast Total Sales of Hot Drinks by Category: Total Volume 2025-2030
Table 35 - Forecast Total Sales of Hot Drinks by Category: % Total Volume Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

SOURCES

Summary 1 - Research Sources

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/other-hot-drinks-in-croatia/report.