



Tea in Croatia

December 2025

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Tea in Croatia - Category analysis

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

Leading supermarkets offer a wide product selection, competitive pricing, and convenience

Sunday trading restrictions drive growth of forecourt retailers

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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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