



RTD Coffee in Serbia

January 2026

Table of Contents

RTD Coffee in Serbia - Category analysis

KEY DATA FINDINGS

2025 DEVELOPMENTS

Healthy volume growth for RTD coffee, thanks to emergence from a low base and low unit prices

INDUSTRY PERFORMANCE

RTD coffee competes strongly with coffee from coffee shops thanks to lower prices

RTD coffee remains a more emergent category with fewer variants

WHAT'S NEXT?

Ongoing positive sales for RTD coffee, as the category continues to grow

New product developments expected in reduced sugar variants and new flavours

Foodservice will be an ongoing obstacle to stronger growth, due to the "café experience"

COMPETITIVE LANDSCAPE

Nestlé's Nescafé Xpress maintains its robust lead, with no direct competition

Starbucks benefits from an increased assortment and new formats

CHANNELS

Supermarkets maintains distribution channel lead thanks to modern retail being the main route for RTD coffee sales

Retail e-commerce sees the strongest growth, albeit from an emergent base

CATEGORY DATA

Table 1 - Off-trade Sales of RTD Coffee: Volume 2020-2025

Table 2 - Off-trade Sales of RTD Coffee: Value 2020-2025

Table 3 - Off-trade Sales of RTD Coffee: % Volume Growth 2020-2025

Table 4 - Off-trade Sales of RTD Coffee: % Value Growth 2020-2025

Table 5 - NBO Company Shares of Off-trade RTD Coffee: % Volume 2021-2025

Table 6 - LBN Brand Shares of Off-trade RTD Coffee: % Volume 2022-2025

Table 7 - NBO Company Shares of Off-trade RTD Coffee: % Value 2021-2025

Table 8 - LBN Brand Shares of Off-trade RTD Coffee: % Value 2022-2025

Table 9 - Forecast Off-trade Sales of RTD Coffee: Volume 2025-2030

Table 10 - Forecast Off-trade Sales of RTD Coffee: Value 2025-2030

Table 11 - Forecast Off-trade Sales of RTD Coffee: % Volume Growth 2025-2030

Table 12 - Forecast Off-trade Sales of RTD Coffee: % Value Growth 2025-2030

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Soft Drinks in Serbia - Industry Overview

EXECUTIVE SUMMARY

Sales remain impacted by economic instability, with volume sales remaining low

KEY DATA FINDINGS

INDUSTRY PERFORMANCE

Health and wellness trends influence demand for reduced sugar options

Busy lifestyles support demand for smaller format sizes to suit on-the-go consumption

Sustainability trends influence the growing use of recycled packaging materials

WHAT'S NEXT?

Volume sales expected to maintain low positive growth, driven by the most in-demand soft drinks

Price sensitivity will continue, with consumers seeking deals, discounts, and private label

Developments expected to focus on lower sugar and functional soft drinks, with flavour remaining important

COMPETITIVE LANDSCAPE

Coca-Cola maintains overall lead thanks to diverse brand portfolio, ongoing innovations, and strong distribution
Private label grows in demand, while lifestyle brand Oshee benefits from the popularity of sports drinks

CHANNELS

Convenience stores benefit from consumers' demand for fast, efficient, small and frequent shopping
Retail e-commerce and discounters grow in demand, catering to convenience and affordability
Foodservice vs retail split

MARKET DATA

Table 13 - Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: Volume 2020-2025
Table 14 - Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: % Volume Growth 2020-2025
Table 15 - Off-trade vs On-trade Sales of Soft Drinks by Channel: Value 2020-2025
Table 16 - Off-trade vs On-trade Sales of Soft Drinks by Channel: % Value Growth 2020-2025
Table 17 - Off-trade vs On-trade Sales of Soft Drinks (as sold) by Category: Volume 2025
Table 18 - Off-trade vs On-trade Sales of Soft Drinks (as sold) by Category: % Volume 2025
Table 19 - Off-trade vs On-trade Sales of Soft Drinks by Category: Value 2025
Table 20 - Off-trade vs On-trade Sales of Soft Drinks by Category: % Value 2025
Table 21 - Off-trade Sales of Soft Drinks (RTD) by Category: Volume 2020-2025
Table 22 - Off-trade Sales of Soft Drinks (RTD) by Category: % Volume Growth 2020-2025
Table 23 - Off-trade Sales of Soft Drinks by Category: Value 2020-2025
Table 24 - Off-trade Sales of Soft Drinks by Category: % Value Growth 2020-2025
Table 25 - Sales of Soft Drinks by Total Fountain On-trade: Volume 2020-2025
Table 26 - Sales of Soft Drinks by Total Fountain On-trade: % Volume Growth 2020-2025
Table 27 - NBO Company Shares of Off-trade Soft Drinks (RTD): % Volume 2021-2025
Table 28 - LBN Brand Shares of Off-trade Soft Drinks (RTD): % Volume 2022-2025
Table 29 - NBO Company Shares of Off-trade Soft Drinks: % Value 2021-2025
Table 30 - LBN Brand Shares of Off-trade Soft Drinks: % Value 2022-2025
Table 31 - Penetration of Private Label in Off-trade Soft Drinks (RTD) by Category: % Volume 2020-2025
Table 32 - Penetration of Private Label in Off-trade Soft Drinks by Category: % Value 2020-2025
Table 33 - Distribution of Off-trade Soft Drinks (as sold) by Format: % Volume 2020-2025
Table 34 - Distribution of Off-trade Soft Drinks (as sold) by Format and Category: % Volume 2025
Table 35 - Forecast Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: Volume 2025-2030
Table 36 - Forecast Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: % Volume Growth 2025-2030
Table 37 - Forecast Off-trade vs On-trade Sales of Soft Drinks by Channel: Value 2025-2030
Table 38 - Forecast Off-trade vs On-trade Sales of Soft Drinks by Channel: % Value Growth 2025-2030
Table 39 - Forecast Off-trade Sales of Soft Drinks (RTD) by Category: Volume 2025-2030
Table 40 - Forecast Off-trade Sales of Soft Drinks (RTD) by Category: % Volume Growth 2025-2030
Table 41 - Forecast Off-trade Sales of Soft Drinks by Category: Value 2025-2030
Table 42 - Forecast Off-trade Sales of Soft Drinks by Category: % Value Growth 2025-2030
Table 43 - Forecast Sales of Soft Drinks by Total Fountain On-trade: Volume 2025-2030
Table 44 - Forecast Sales of Soft Drinks by Total Fountain On-trade: % Volume Growth 2025-2030

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SOURCES

Summary 1 - Research Sources

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