



# RTD Coffee in Serbia

January 2026

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## 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

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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

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## SOURCES

Summary 1 - Research Sources

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