



Processed Fruit and Vegetables in Croatia

November 2025

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Processed Fruit and Vegetables in Croatia - Category analysis

KEY DATA FINDINGS

2025 DEVELOPMENTS

Persistent cost-of-living pressures encourage consumers to seek affordable options

INDUSTRY PERFORMANCE

Strengthening preference for locally produced and natural products

Sustained demand for tomato-based products, canned peas, pickled vegetables, and mixed vegetable products

WHAT'S NEXT?

Gains from pricing and gradual trading-up rather than strong volume expansion

Health and wellness developments

Sustainability will remain a central pillar

COMPETITIVE LANDSCAPE

Ledo's decisive lead supported by strong brand recognition and alignment with consumer demand for affordable and healthy convenience foods

Podravka expands capacity, strengthens local sourcing and enhances operational sustainability in 2025

CHANNELS

Supermarkets offer affordability, convenience, and variety

E-commerce expands through convenience, speed, and service flexibility

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Staple Foods in Croatia - Industry Overview

EXECUTIVE SUMMARY

Moderate growth supported by stable demand, health-oriented innovation, and local supply development

KEY DATA FINDINGS

INDUSTRY PERFORMANCE

Private label expansion as economic pressure persists

High global sugar and cocoa prices present challenges for sweet staples

Health and sustainability trends advance

WHAT'S NEXT?

Stable demand, tourism growth and a gradual recovery of purchasing power ensure steady growth

Companies focus on efficiency, innovation, and credibility

Supermarkets and discounters to maintain their dominance

COMPETITIVE LANDSCAPE

Fortenova remained the undisputed leader, combining scale, brand recognition, and distribution strength

Delta Holding SA's strong growth fuelled by its healthy positioning, improved store visibility and affordable pricing

Strong preference for Croatian products

CHANNELS

Supermarkets lead, expanding their private label ranges and strengthening their image as price-conscious, consumer-oriented retailers

E-commerce expansion as major supermarket chains invest in improving digital platforms, delivery logistics, and integration between online and offline promotions

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